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**A Study Of Primary Headteachers' Perceptions Of
Their Continuing Professional Development
Needs In One LEA.**

Christine Taylor.

**A dissertation submitted to the University of Bristol
in accordance with the requirements of
the degree of Doctor of Education.**

27,000 Words.

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ABSTRACT.

Headteachers in England have had to cope with multiple changes since 1988, and the pressure for change nationally is continuing. Research on school effectiveness and school improvement has emphasised the importance of the headteacher's role in effective schools. Successive governments have responded to this by introducing national initiatives to strengthen the selection and training of headteachers for example: the introduction of the National Standards for Headteachers from the Teacher training Agency (TTA, 1997); the National Professional Qualification for Headship (NPQH, 1997); and the National College for School Leadership (Tony Blair, 1998). Indeed the Chief Inspector for Schools in his Annual Report (OfSTED, 1998a) stated that, 'the headteacher is the critical figure in the drive to raise standards'. Sir Michael Bischoff, permanent secretary at the Department for Education and Employment (DfEE), told the Secondary Heads Association at their conference in Harrogate (spring 2000) that, 'Heads hold the key to transformation in schools' and that it was their leadership that was the key.

This study was an examination of the continuing professional development (CPD) needs of primary headteachers in a newly formed Unitary Authority (1997). This original research investigated continuing professional development (CPD) through: a questionnaire to all sixty nine primary heads; an interview with ten selected headteachers, and the Senior Primary Inspector, and analysis of fifty nine OfSTED reports (1995-1998). The study investigated the primary headteachers' attitudes to headship and CPD. A literature review was carried out focusing on the role of the primary headteacher, leadership, school effectiveness and improvement, training needs, and the availability of CPD. The conceptual framework drew upon the school effectiveness and professional development literature. The results of the study make recommendations about the need for and provision of CPD and how best to meet the perceived needs of the primary heads.

DEDICATION AND ACKNOWLEDGEMENTS.

My grateful thanks go to the Chief Inspector, Senior Primary Inspector and to all the headteachers in the chosen LEA, who completed the documentation and allowed me access to their thoughts. My particular thanks go to the ten interviewees for their time and insight.

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AUTHOR'S DECLARATION.

I declare that the work in this dissertation was carried out in accordance with the Regulations of the University of Bristol. The work is original except where indicated by special reference in the text and no part of the dissertation has been submitted for part of any other degree.

Any views expressed in the dissertation are those of the author and in no way represent those of the University of Bristol.

The dissertation has not been presented to any other University for examination either in the United Kingdom or overseas.

Signed: *Christine Taylor*

Date: *July 2001*

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CHAPTER ONE.

INTRODUCTION.

Statement of the problem.

The focus of the study is to explore, in one local education authority (LEA), what are primary school headteachers' perceptions of headship, what they perceive their training needs to be in the context of raising standards, and how they consider these needs may best be met. The role of the headteacher is changing, with new opportunities and challenges presenting themselves to headteachers, and consequently it is important that headteachers' skills are up to date. However, despite the fact that there are more than 20,000 primary schools in England and Wales there has been little research to date on primary headship with specific reference to both leadership and management, and the CPD needs of primary headteachers. It is important to investigate this under-researched area, particularly in the light of the school effectiveness and school improvement research, which highlights the importance of the headteacher.

Significance of the study.

This study was initially embarked upon for a number of inter-related reasons, first because of the researcher's personal and professional experience of primary headship, and experience as a participant and provider of management training courses for primary heads. Second, the study is significant because the role of the headteacher is seen to be central to school improvement. Indeed, the Chief Inspector of Schools in his Annual Report stated that,

The headteacher is the critical figure in the drive to raise standards. We have many committed, highly effective heads. We need more. It is upon these two imperatives that the policy agenda should focus.

(OfSTED, 1998a p.4)

The importance of the head's role was also highlighted in the Green Paper, 'Teachers: meeting the challenge of change' (DfEE, 1998). One of the four main objectives outlined in the Green Paper was to, 'strengthen leadership' with high quality training for heads seen as essential to support strong leadership. The Government stated it planned to invest £100 million in headship training in the years 1999-2002. Estelle Morris, School Standards Minister stated that,

Excellent headteachers are crucial to securing the success of our schools and to achieving a world class education system for our children in the new century.

(Morris, 1998 p.2)

On the 20th October 1998 the Prime Minister announced that by September 2000 there would be a National College for School Leadership, based at the University of Nottingham. He argued that the twin objectives of the establishment of a leadership college were to enhance the status of the headteacher, and to enhance training and development for school leaders.

These initiatives demonstrate the Government's view that good headteachers are crucial to the success of schools. The Government agenda, coupled with the introduction of The National Standards for Headteachers (TTA, 1998) has had a powerful impact on how headship is viewed. Although these initiatives underline the Government's new focus on the importance of headship, there is evidence that teachers are unwilling to take on the headship role. For example, the Chief Inspector of Schools in his 1998 Annual Report stated that vacancies for headteachers had almost trebled in the period 1993-1998 (OfSTED, 1998a). Primary school headships are becoming more difficult to fill, which is evident from the large numbers of re-advertisements in the Times Educational Supplement (TES), and the small number of applicants applying for primary school headships, particularly in inner city multicultural areas

(John Hewson, TES, 03/02/1997). One may ask the question here as to whether CPD for headteachers might make the role of headship more attractive.

Conceptual framework.

The study will draw upon two bodies of literature, that of professional development, and of school effectiveness and school improvement. It is important that it is clearly established what is meant by 'professional' development, and what strategies might be employed to develop headteachers. The question may then be asked what role continuing professional development of headteachers should play. Professional development is characterised here as one aspect of lifelong learning, and Garnett (1995) suggests three key dimensions of the term 'professional' when applied to teachers. The first dimension refers to training in a body of knowledge, the second having a code of ethics and professional values, and the third that there is commitment to the core business of the organisation. These are discussed more fully in chapter two.

Eraut (1992) identifies these three dimensions and more in a network of related concepts, which include 'self regulation' and 'autonomy', as well as 'service' and 'accountability'. There is a tension between the outward notion of client awareness, which suggests a market or contractual accountability, and the inward looking internal control and autonomy, which seem to correspond to professional accountability.

Watkins and Dury (1994) suggest that there are four groups of strategies for the development of professionals:

- ◆ Developing a new mind set;
- ◆ Learning to promote and market one's skills, networking and cultivating relationships;
- ◆ Developing self-insight and taking personal charge;
- ◆ Developing a range of competencies.

The study, which was informed by the work of Eraut (1992), and Watkins and Dury (1994), will investigate headteachers' understanding and perceptions of continuing professional development. The continuing professional development needs of headteachers will be investigated from the perspective of the LEA, the primary headteachers, and the national and Government perspective, with an analysis of the data relating to primary school performance. Within these changing and developing national and local contexts emphasis has been given to the need to provide continuing professional development for headteachers. It is anticipated that by conducting research in a particular LEA, and by focusing specifically upon the perceptions of current primary headteachers, the findings will inform those involved in meeting the CPD needs of primary headteachers.

Research questions.

The focus of the study is to explore in one LEA what the primary headteachers' perceptions of headship are, what their training needs are in the context of raising standards, and how they consider their needs may best be met. The work investigates the perceptions of primary headteachers and focuses upon four specific research questions:

1. How do current primary heads view headship?
2. What are the perceived continuing professional development needs of primary headteachers?
3. How might these training needs best be met?
4. What is the Government doing to improve leadership and management of headteachers and will this meet the needs of primary headteachers?

The research approach will involve both qualitative and quantitative methods. It will be a case study based in one LEA making primary use of questionnaires and interviews. An analysis of the OfSTED reports for the primary schools within the LEA will also be undertaken, enabling the four key questions to be considered from a different perspective.

The importance of both the context and relevant contextual factors within any inquiry is stated by Bell and Newby in Burgess (1984, p.6) as they urge researchers to consider the setting of their research. Indeed as attributed to Emperor Lothar (795-855) 'Times change and we change'. It is therefore important to consider the various contexts, which affect the proposed study.

The national context.

It is within the national context that headteachers are working, and there have been many changes in the education system since the 1988 Education Act. These changes have included the introduction of LMS, opting out, open enrolment, the introduction of the National Curriculum and the associated Standard Assessment Tasks (SATs) and teacher assessment (TA), teacher appraisal, the new Code of Practice for Special Educational Needs (SEN), the increasing responsibilities for school governors, OfSTED, the new reporting arrangements, Health and Safety, The Children's Act, the changing role of the Local Education Authorities (LEAs), the publication of school SAT results in league tables, and performance management, all of which have contributed to and impacted upon the nature and role of the primary headteacher.

Primary headteachers have had to cope with these multiple changes in the 1980's and 1990's, and the pressure for change is still continuing. In the pursuit of raising standards in schools new Government initiatives include: the setting of standards for newly qualified teachers and for headteachers (TTA 1998b). The National Standards for Headteachers set out the knowledge, understanding, skills and attributes, which relate to the key areas of headship. The standards are in five parts and include: the core purpose of the headteacher; key outcomes of headship; professional knowledge and understanding; skills and attributes; and key areas of headship. The core purpose of headship is stated as being:

To provide professional leadership for a school which secures its success and improvement, ensuring high quality education for all its pupils and improved standards of learning and achievement.

(TTA, 1998b, p.4)

National standards for professional leadership by headteachers are highlighted in the Government's initiatives. In 1997 the Chief Inspector of Schools, in his Annual Report, identified 3,000 headteachers as poor leaders. Leadership is increasingly being promoted (TTA, 1998), and its importance has been underlined by the school effectiveness research, with the proposal that effective leadership is something that can and should be learnt. Indeed this has resulted in a major new strategic initiative by the Teacher Training Agency (TTA) to develop the new National Professional Qualification for aspiring Headteachers (NPQH), which is expected to become mandatory, and the National Leadership Programme for Serving Head Teachers (LPSH). In July 1998 the first aspiring heads were awarded their NPQH certificates, with Anthea Millett (Chief Executive of the TTA) hosting the presentations. The TTA Standards for Headteachers set out clear expectations about headteacher performance.

The Teacher Training Agency stated in its annual report (1997) that it expected 5,000 applicants for the NPQH by the end of 1997, although it received just over 3,000 and its latest figure, 4,100, still represents a 20% shortfall. David Hart of the National Association of Headteachers (NAHT) said, 'The NPQH is facing real difficulties in recruitment and this gives great cause for concern' (Hart, 1998).

The TTA is committed in its corporate plan, 1998-2001, to improve teaching quality through initiatives in every area of teachers' professional development, from recruitment to initial teacher training and induction through to headship. One of their aims is, 'To promote well targeted, effective and co-ordinated continuing professional development' (TTA,

1998a, p.3). The TTA in their Corporate Plan have as their strategic objective number 6, 'To improve the quality of school leadership and Management' (TTA, 1998a, p.30). This objective is linked with equipping all headteachers to improve their own performance and standards in their schools.

This work is being further developed through the establishment of Leadership Centres. In 1996 The London Leadership Centre was opened as a base for London's school leaders, with a brief to help raise achievement in the capital's schools through the promotion of leadership skills, intellectual growth and the overall effectiveness of headteachers. OfSTED itself stated that,

The leadership qualities and management skills of the headteacher are major factors contributing to a school's performance.

(Ofsted 1998, p.4)

Government Ministers are making £25 million available in 1999/2000 for training headteachers and for inservice training of headteachers, which is twice the amount for 1998/1999. This push for headteacher training is influenced by the Government view that the role of the headteacher is essential for effective management of schools. The Department for Education and Employment research findings (DfEE, 1993) show that the effective management of schools is increasingly found to be influential for the learning and development of pupils. Further research evidence (Fullan, 1991, 1992) confirms that effective schools do not just happen, but that these schools are effective because of the effective management structures which impact on the teaching and learning (Harris, Jamieson and Russ, 1996, p.85). A basic definition of effectiveness is, 'the production of a desired result or outcome' (Levine and Lezotte, cited in Stoll and Mortimore, 1998, p.1). The focus on standards is not new.

Under the present regulations the process of a day's inspection is almost entirely changed. Formerly... we were occupied chiefly in examining process; now we are occupied almost entirely in testing results

(Runciman, 1887, p.26)

The quotation was not written by an Office for Standards (OfSTED) Inspector assessing a set of Standardised Assessment Task (SAT) results, but from the minutes of a meeting of the Committee of Privy Council on Education in 1864 (Runciman, 1887). The revised code was designed to improve the 3Rs with the introduction of literacy and numeracy strategies, assessment tests and extra pay for 'super teachers' (8 shillings per teacher). The current focus on standards particularly relating to numeracy and literacy is therefore not new.

The local context.

The study took place in a new unitary Authority established in April 1997 in England, within its first year of operation. The Authority is situated in an urban setting with sixty-nine schools catering for the primary age range. The new Unitary Authority has responsibility within the primary age range for County and Aided schools ranging in size from group 1 with 98 pupils, to group 3 with 618 pupils, within an urban setting. There are 18,731 primary children in 29 Infant Schools, 22 Junior schools, and 18 Primary schools (Data taken from Form 7 15/1/98). The schools within the LEA vary with the percentage of free school meals (FSM) ranging from schools with 4% to 63%, with 46% of schools having more than 30% of pupils entitled to FSM. English as a second language (E2L) also varies significantly across the city with some schools having no E2L pupils, to schools with 51% of children with English as a second language. Pockets of multiculturalism and deprivation therefore exist across the City.

Not only are headteachers working within the national framework of government initiatives, they are also working within a local context where there is pressure to raise pupil achievement, and headteachers are seen as a key element in the campaign to raise standards. On 21st April 1997 the Executive Director of Education, at the LEA inaugural conference, discussed the relative standards of education within the LEA, which he perceived to be low, compared with similar education authorities. In summary the Director of Education stated that there needed to be a focus on raising expectations and achievement, building upon the existing good practice within the City.

A programme for quality assurance and school improvement was set out, complete with aims, objectives, and processes including quality assurance, targeted support, establishing an infrastructure and identifying improvement projects. The developments were designed, by the management group of heads, inspectors and officers, for all parties including the members of the Education Services to work collaboratively in partnership, with the school staffs and governors, with seventeen initiatives being identified across all phases of education within the city. A careful monitoring and evaluation system was built into the initiatives/projects for improvement, to ensure that effective measures are put into place to raise achievement across the LEA.

The LEA is currently promoting that, not only should every school have a staff development policy, and a staff development plan, but that every member of staff should:

- ◆ Have a learning plan which is annually reviewed through appraisal;
- ◆ Have a specification of the mature competencies and knowledge base relating to his/her post – a learning profile;
- ◆ Keep a record of their learning – a learning portfolio – which might be supported by a learning diary;
- ◆ Benefit from learning interviews with a nominated learning partner;

- ◆ Be entitled to off-the-job learning time.

(EQS, 1999, p.2).

The new Authority is formulating and establishing its priorities and procedures, working in partnership with its schools to establish and create its own identity across the City. In the past the schools were part of a very large LEA, with varying needs, not always specific to the needs of the city schools. Within the smaller Unitary Authority, in the early stages of working with its schools, governors, and parents, initiatives to raise standards as well as to create closer links with Education Quality Services (Inspectorate) and schools across the city have been in evidence, which has enabled headteachers to join working parties with LEA personnel. For example the LEA has introduced a termly link inspector visit focusing initially on school evaluation, as well as a range of improvement projects across the city. Heads testified that this was indeed an improvement on the previous LEA where visits and support were not always evident.

Continuing professional development opportunities within the chosen LEA are focused around the priorities of the Strategic Education Plan (SEP), and the School Improvement Plan (SIP). There are five key themes arising from the two plans: raising standards; improving the quality of provision; working together; equality, entitlement and inclusion; and lifelong learning. Opportunities for continuing professional development with the unitary authority are limited for a number of reasons. Firstly the LEA is still establishing its infrastructure, secondly the LEA does not have the resources to provide for a comprehensive continuing professional development programme, and thirdly there is neighbouring complementary provision from other providers.

Currently there are limited opportunities within the LEA to support headteachers' CPD, and those on offer include individual school supported-self evaluation, and a limited number of places on the leadership and management course. Other opportunities for professional

development include briefings, the opportunity to participate in task groups, cluster projects and free standing courses. There is also a two-day residential course for heads and deputy heads to pursue an identified project within their own school.

The schools can currently buy into the new Unitary Authority support, which all primary schools have done, as well as into neighbouring authorities. As links had previously been established with headteacher colleagues in what is now a neighbouring LEA, headteachers had a wider choice of headteacher groups and of INSET to choose from, and could go outside their own LEA for CPD. Support was then available from within their own LEA and from established links prior to the new Unitary Authority. A wide range of management courses is currently on offer from the previous authority (LEA INSET 1997/8, and 1998/9), although the locations of the courses are situated over a wide geographical area, which may make them prohibitive, due to expense or travelling time, for headteachers located within the new Unitary Authority.

Research methods.

The study will focus upon primary headteachers within the new Unitary Authority. Involved in the study through the use of a postal questionnaire will be all the 69 LEA primary headteachers from Infant, Junior, and Primary schools from County and Aided schools. Ten headteachers will be selected for follow up interviews.

Data will be collected from a variety of sources, primarily through documentary evidence (Ofsted reports) interview, questionnaire, and through participation in a LEA Leadership and Management Project. It is envisaged that the product of the research will be threefold. Firstly, that it will relate to previous research in this area, and it will challenge and/or support earlier findings and produce original research about the perceptions of primary headteachers at a time of change. Secondly that recommendations about the need and provision of CPD, and how best to

meet the perceived needs of primary headteachers will be formulated. Lastly, a report for the LEA to inform future planning of CPD for primary headteachers will be part of the product of the research.

The organisation of the dissertation.

The dissertation is organised into five chapters. The first chapter outlines and discusses the rationale for the study, states the four research questions, and outlines the national and local context for the study. This chapter briefly describes the participants in the study, the methods and instruments used to collect data, and the product of the research. The organisation of the dissertation is outlined, and chapter one concludes with a summary of the chapter.

Chapter two focuses on the literature review which will consider the major influences and changes in the education system since the 1988 Education Reform Act, as they have impacted upon primary schools, and the primary school headteacher. The changing role of headship, and studies on headship will be discussed, as will the nature of leadership, school effectiveness and improvement, and the professional development of headteachers. A review of the relevant literature including national and local contexts will provide a context for the work in hand.

Chapter three outlines the rationale for the methodology underpinning the study. The methodology chapter involves a consideration of research design, data collection, data analysis and theorising together with the social, ethical, and political concerns of the social researcher.

Chapter four uses the following framework to discuss the results of the study: an overview of the population of the primary headteachers in the chosen LEA; followed by a detailed examination of the four research questions through presentation of the data.

In the final chapter the aims of the study are reviewed, the findings are interpreted, conclusions reached, and suggested recommendations for future action are made to the LEA. Limitations of the study and suggestions for future research are also contained in this fifth chapter.

Summary.

The focus of the study is to explore in one LEA how primary school headteachers perceive headship, what their training needs are in the context of raising standards, and to determine how best their needs may be met. The major influences and changes in the education system since the Education Reform Act of 1988 as they have impacted upon the primary school headteacher will be considered, as will the local context. The study was embarked upon for a number of inter-related reasons, that of the researcher's personal and professional experience of primary headship, and the raised profile of the headteacher through Government initiatives. The following Chapter reviews the relevant literature relating to leadership and management of headteachers.

CHAPTER TWO.

LITERATURE REVIEW.

General Introduction.

The study is an investigation of primary headteachers' attitudes to continuing professional development within one LEA. In order to examine this topic literature was reviewed on the following themes:

- ◆ What research has been undertaken on primary headship and what does it tell us about how the role has changed?
- ◆ What provision has been made for CPD for headteachers since the 1980's, and how is it defined?
- ◆ What is the role of the headteacher in school improvement and what implications does this have for training?
- ◆ What does the literature tell us about the appropriate content and effective methods of development and training for headteachers?

In conducting a literature search for research studies on headship which considered training, leadership, and raising standards, the database ERIC (Resources in Education) was the primary focus, with a search also conducted on the Current Journals In Education (CJIE). Government documentation about headship training was also reviewed.

What research has been undertaken on primary headship and what does it tell us about how the role has changed?

The main themes explored in the literature review relating to primary headship are those of: professional development of headteachers; the impact of changes in the education system since the 1988 Education Act; school effectiveness and school improvement; and leadership. Through reviewing the above, the study will draw upon the literature to orientate and conceptualise the study. Questions relating to the type and nature of continuing professional development for primary headteachers, the ways in which heads learn, how the nature of headship has changed, what school effectiveness and improvement studies show, and what educational

leadership theorists say will all contribute to and have implications for the design of the study. *

With a focus on processes, outcomes, and international perspectives, it was apparent that there were many empirical studies (more than forty) over the past twenty years that discussed the headteacher and school effectiveness (Hallinger and Heck, 1998). From the literature it is evident that organisational processes as well as school leadership are constantly evolving according to new demands. For example, the concept of the school as a learning organisation (Cole, 1995), with Hargreaves (1994, p.63) illustrating his view of school as an organisation characterised by, 'flexibility, creativity, opportunity, collaboration, and continuous improvement'. The general literature and research on headship will be briefly reviewed including, surveys, and case studies.

It is evident that research focusing upon headteachers in the British education system is not new, and that they have been the subject of research since the last century, in the form of accounts of the careers and views of leading headmasters such as Arnold of Rugby, and Moberly of Winchester. They, and other Victorian Headmasters (Castle, 1967) and Headmistresses (Pederson, 1975) continued to attract the interests of researchers. In 'Some aspects of the Headmasters Tradition', Baron (1956) reflected that not only did we need to consider looking back, but that researchers needed to look forward as to what characterises headship today.

From this time there has been much research in a variety of forms including descriptions listing the duties and responsibilities of headteachers (DES 1989), and official descriptions of what headteachers do (ILEA 1985, p.66). Investigations have studied headteacher behaviour (Clerkin 1985, Davies 1987, Johnson and Short 1998); and there have also been observational studies of headteachers (Coulson 1986, Nias 1989, Nias, Southworth and Campbell 1992). Descriptions of the changing

nature of headship have been carried out (Nightingale 1990, Mortimore and Mortimore 1991, Alexander, Rose and Woodhead 1992, Webb 1994, Southworth 1995). Studies have been conducted into headship and leadership style (Coulson 1976, 1988, Nias 1980, Lloyd 1985, Fidler 1997, Shen 1998). Literature is available on issues related to school management (Whitaker 1983, Day, Johnson and Whitaker 1985, Paisey and Paisey 1987, Wallace 1988, Hill 1989). Another body of literature is related to headteachers, effective schools, school improvement, and the self managing school (DES 1977, Rutter 1979, Reynolds 1982, Mortimore 1988, Muse and Wallace 1988, DES 1990, School Management Task Force 1990, Cadwell and Spinks 1992, Bolam 1993, Eraut 1994, DeCrane 1996, Bowring-Carr and West Burnham 1997).

A main theme running throughout the literature is the power of headteachers, and what is missing is any consideration of the differences that training, school size and location may have on the work of the head (organisational characteristics), as well as a lack of any idea of what it actually feels like to be a primary school headteacher in the 1990s. A consideration is that much of the research was conducted prior to the 1988 Education Act, and that many of the later studies draw upon these works, which may or may not reflect the current realities of primary school headship in the 1990s.

Recent studies by the NAHT (1995), who commissioned a report to assess the labour market for senior staff in school, noted that just under 30% of headteacher posts in primary and secondary schools in England and Wales which had become vacant due to retirement were regarded as due to 'early retirements'. In addition some 7% of headteachers had retired due to ill health or stress (NAHT, 1995, p.11). Despite changes in the retirement regulations this is a high percentage of headteachers voting with their feet and leaving the profession. Job satisfaction may be an issue here, and indeed, in view of recent concerns expressed about the difficulty of

persuading teachers to become headteachers, the connection between job satisfaction and perceived training needs is of importance.

David Mercer (1995) puts forward the hypothesis that retirement and job satisfaction are linked, and that heads who have job satisfaction do not retire. He discusses whether there is a connection between headteachers' job satisfaction and their perceived training needs. Job satisfaction, Mercer argues, is underpinned by the needs and values of the headteacher and that these are directly related to the head's self perception, relationships, and a sense of efficiency. There are however other factors that could be considered when discussing headteachers' job satisfaction - for example personal, organisational, and/or contextual characteristics, all of which may impinge upon the nature of the job.

This section will briefly consider the major influences and changes in the education system since the 1988 Education Reform Act (DES, 1988) as they have impacted upon the primary schools, and upon the primary school headteacher. The changes imposed it will be argued, have resulted in a change in the nature of headship, with additional responsibilities. There has been much research into school effectiveness with the DfEE (1993), and OfSTED (1998a), acknowledging that the role of the head is a major factor in contributing to a school's performance. Leadership, power, and the introduction of appraisal will also be reviewed.

The 1988 Education Act (ERA), and subsequent Education Acts, have had a significant impact upon the nature of headships. We have seen: the introduction of Local Management of Schools (LMS); opting out; open enrolment; the introduction of the National Curriculum and the associated Standard Assessment Tasks (SATs) and Teacher Assessment (TA); teacher appraisal; the new Code of Practice for Special Educational Needs (SEN); the rapidly growing responsibilities of the school governors; OfSTED; the new reporting arrangements; Health and Safety; The Children's Act; League Tables; the introduction of Nursery Vouchers;

retirement changes; the changing role of the Local Education Authorities (LEAs); raising standards initiatives; the introduction of National Standards for Qualified Teacher Status to Headteachers; new Unitary Authorities; performance management; and the associated training programmes for new and aspiring heads (HEADLAMP, NPQH) as well as for serving headteachers (LPSH); all of which have contributed to the changing nature of Headship.

In the 1995 study by Weindling *et al* 90% of secondary headteachers said that their role was very different from when they started ten years previously. The study although focused on secondary heads is relevant since primary heads have experienced similar pressures from change. If the headteacher's role has changed as Weindling's research suggests, then it follows that the training and continuing professional development of headteachers also needs to change, so that they are equipped to carry out their additional or new responsibilities.

All of these issues have impacted upon the headteacher, and are acknowledged by The National Commission on Education (NCE, 1993) who argue that,

Heads have a powerful role, but the major changes, which are affecting schools, will make even more significant demands. This is affecting all senior staff in schools, but is felt most by heads, whose roles and responsibilities have increased most of all.

It also notes that,

The Government has stressed that successful implementation of its reforms depends upon leadership of schools by experienced, dedicated and highly motivated heads. We agree with that judgement.

(NCE, 1993, p. 229).

Indeed, with the changes in educational organisation, particularly with LMS and the erosion of local authority support, the quality of individual schools depends far more heavily on the quality staff, including the head. This has been reinforced recently by evidence that failing schools almost always have trouble at the top, the Ridings in Halifax being a high profile example. With the changes in the role and constrained by limited time, headteachers were very selective and opted for courses that would enhance their knowledge (Creese, 1991, Kerry and Murdock, 1993). Skills based courses were less frequently attended since they were perceived to be less important and require a greater time commitment than specialist knowledge based courses (Kerry and Murdock, 1993). This would imply that there is a need for a more structured and accessible training programme.

Primary school headships are becoming more difficult to fill, which is evident from the large numbers of re-advertisements in the Times Educational Supplement (TES), and the small number of applicants applying for primary school headships, particularly in inner city multicultural areas. New figures revealed 03/02/1997 from the TTA showed a massive leap in the numbers of headteachers leaving the profession. The news came just 24 hours after the HM Chief Inspector condemned 3,000 heads as inadequate and stressed in his annual report the crucial importance of leadership in raising school standards. The figures were based on an analysis of advertisements for headteachers in the TES January (1997). In primary schools the number of advertisements increased from 267 to 334, a 25% increase on the previous year at that time. The figures were disclosed by John Howson, head of the TTA supply unit, during a Commons Education Select Committee inquiry into future recruitment needs. Howson also noted that just under 30% of headteacher posts in primary and secondary schools in England and Wales were vacant due to retirement, and in particular early retirement. In addition 7% of headteachers retired due to ill health or stress (NAHT, 1995, p.11).

The changing role of headship offers challenges and opportunities. The changes have had a deep impact on headship, and on the nature of the job. The challenge of school based management, is exemplified through the headteacher taking the lead professional role, to the undertaking of a range of management tasks. The second challenge, is that of competition, and headteachers have had a lonely and challenging job over the last decade. There has also been central prescription, and a difficulty in legitimately balancing the role of the governors and that of ownership within the school. The standards agenda has provided both hard and soft data, e.g. the high profile of what makes a good school. Performance management has been introduced, and there have been social changes, with increasing sources of instability, impacting in schools through more multi-agency work. The challenges of the job have impacted on the recruitment of headteachers, which has fallen over the last decade.

The changing role of headship has also created opportunities for the headteacher, and leadership and management is now viewed as a vital element in our schools. A further opportunity can be identified, that of the headteacher refocusing on learning and teaching, e.g. creating the learning community. The opportunity is there for the headteacher to release the full potential of the school and its community and to improve performance. The changing role of headship has also created opportunities for continuing professional development, and the development of a new professionalism.

Headteachers have not always undertaken continuing professional development, for a variety of reasons. The first is lack of time, either to undertake the training, or to take action after the event. Lack of funding is another reason cited by headteachers for lack of continuing professional development. The lack of need for continuing professional development and a scepticism about the quality of the training are other reasons stated by headteachers for not undertaking training (EMIE, 1997).

There are many reasons as to why headteachers should undertake training. These would include the need to prepare themselves for a demanding role, to acquire new skills, knowledge and understanding, and to share best practice from inside and outside of the education system. It is beneficial for the headteacher to refocus their vision and recharge their batteries. Research has shown that headteachers would benefit from refocusing after seven years, so that they could have quality time to reflect upon particular qualities, ways of proceeding, and plan the next development cycle for their school (EMIE, 1977). Another justification for the headteacher undertaking training is that they are the role model for their school of a lifelong learner.

Johnson and Short's (1998) study in the USA investigated the relationship between bases of leader power and teacher empowerment, teacher compliance, and amount of conflict within self, with peers and with principal. Power in organisations is defined as,

the ability of one party to change or control the behaviour, attitudes, opinions, objectives, needs, and values of another party

(Rahim, 1989, p.545).

French and Raven (1959) identify five power bases:

- ◆ Legitimate power - the legitimate right of the leader by the position that he holds to prescribe or control behaviour;
- ◆ Coercive power - the leader's control over punishment;
- ◆ Reward power - the leader's control over reward;
- ◆ Expert power - special knowledge or expertness;
- ◆ Referent power - the subordinate's desire to identify with the leader.

The headteacher may use any of these power bases to carry out their work within the school which will affect teacher empowerment, teacher conflict and teacher compliance. Johnson and Short's research (1998) showed that expert power had the greatest effect on teacher empowerment and the amount of conflict. The more referent power that the teachers perceived the principal to hold, the less they perceived themselves to be in conflict with their principal. Where the principal exhibited low amounts of expert power high amounts of conflict were found. Only referent and expert powers were positively associated with teachers' satisfaction and performance.

What the research about power indicates is that school leaders need to refine those leadership qualities that develop and foster interpersonal relations with teachers. Headteachers need to be prepared to operate from personal power bases, rather from position power bases. Professional development of headteachers also needs to ensure that those skills and knowledge that teachers would conceive as expertise are developed. One of the forces driving the empowerment movement in education is that of teacher effectiveness. Leithwood, Begley and Cousins (1992) propose that expert leadership is characterised by expert problem solving, and they put forward that the more it can be demonstrated that a person knows how to solve a problem, the more expert the leadership will be perceived.

A powerful factor is thus identified that of the headteacher as the instructional leader (Leithwood, Begley and Cousins 1992), as identified by the link between expert power and empowerment. The instructional leader will play a strong role in developing the skills of the teachers and in weakening any resistance to change (Leithwood *et. al*, 1992). Continuing professional development for headteachers should then contain an element where the connection between leadership behaviours, conflict, teacher empowerment, and school outcomes can be evaluated (Johnson and Short, 1998).

What provision has been made for CPD for heads since the 1980s, and how is this CPD defined?

Continuing professional development for headteachers will be reviewed including a report from The Education Management Information Exchange (EMIE, 1996) which surveyed all LEAs in England, Wales and Northern Ireland in the spring of 1995 as to the role of the LEA in continuing professional development of headteachers beyond induction.

‘Professional’ development is characterised in this study as one aspect of lifelong learning, and Garnett (1995) suggests three key dimensions of the term ‘professional’ when applied to teachers:

- ◆ A professional will have undergone a lengthy period of professional training in a body of knowledge (Coulson, 1986);
- ◆ A professional is controlled by a code of ethics and professional values (Hughes, 1985);
- ◆ A professional is committed to the core business of the organisation (Coulson, 1986).

Teacher professionalism starts from the notion that teachers have authority and responsibility to make decisions in the best interests of their students (Sykes, 1991). There are two points that are central to the notion of teacher professionalism, that of teachers and leaders being responsible for making their own decisions about their practice, and the second that they need to account for their actions. A study by Wildy and Wallace (1994) set in the context of the 1992-1995 Western Australian School Leadership Programme, examines the effectiveness of the portfolio as a means of helping school leaders to understand their own accountability relationships and to account for their practice to their peers.

The literature on headteacher development covers the ways in which heads learn as characterised by McHugh and McMullan (1995), Bullock, Jamieson and James (1995), what they should learn Eraut (1994), Bell

(1996), and how they should learn McMahon (1994), Southworth (1995) and Pocklington and Weindling (1996). Bullock and her colleagues identify a range of ways in which headteachers learn which include: learning from colleagues; attending courses; reading; and through reflection on critical incidents. In recent years Kelly (1995) has argued that there has been a move away from learning through reflection, theoretical analysis and pragmatic approaches to learning through active participation.

Central to how headteachers should learn is the idea of mentorship (McMahon, 1994), and this fits with Kelly's notion of learning through active participation, and that of Bullock and Thomas (1995) who have expanded the work of Eraut (1992) by suggesting that management training should be a part of teachers' professional development from early on in their career. This approach would also fit with the notion of a 'learning organisation' (Cole, 1995).

From the literature on portfolios (Wolf, 1991), comes the idea that the learners are responsible for their learning and that they, 'should select those aspects of their learning experience to be included in the portfolio' (Barton and Collins, 1993). In Wildy and Wallace's 1998 study, the portfolio, as a vehicle for headteachers to use for improving performance and being accountable for their actions proved problematic.

The provision for management development and training of headteachers has changed since the early 1980s, with provision before this time 'patchy' (Hughes, 1985). From 1983-1988, the Government to promote headteacher training funded the National Development Centre (NDC) (Wallace and Hall, 1989). Since 1987 management development and training has been a feature of grant schemes from the Government (General Teaching Council, 1993). The School Management Task Force from 1989-1992 worked with LEA consortia to promote and make more accessible practical forms of support and training for senior managers.

Other initiatives have included appraisal (1991), and national pilot schemes for mentoring (1992), with the HEADLAMP scheme being introduced in 1995 by the Teacher Training Agency. Since this date the NPQH and LPSH has been introduced for aspiring and serving headteachers, which has heralded the first national qualification for headship (TTA, 1998b).

Local Education Authorities (LEAs) were surveyed by the Education Management Information Exchange (EMIE) in the spring of 1995, with the focus on LEA provision for the management development and training of headteachers beyond induction (EMIE, 1995). The response rate by the LEAs to the questionnaire was 46%. Approximately 50% of the LEAs who participated in the survey had a senior adviser/inspector with specific responsibility for management development within the LEA. In 25% of the LEAs the responsibility was designated to an Education Officer.

What was interesting from the survey was that 55% of the LEAs who responded did have a specific strategy for the progressive development of headteachers following their induction. The range of courses on offer included: OfSTED; managing time; school development planning, monitoring your staff, team leadership skills and total quality management (TQM). The courses ranged from: ½ day; 1 day; and twilight sessions including headteachers conferences, which may have included a residential element.

LEAs responded to questions about the identification of headteachers' professional development needs, and the strategies that they used to determine needs. The results showed that a variety of means of identifying headteachers' needs were common with the use of: questionnaires to heads; discussions with headteachers' professional/phase associations; link inspectors/advisers; and other means. Other means was interpreted as: headteacher development groups; steering groups; an advisory group on INSET; a joint LEA/heads working group; information from school

development plans (SDPs); and appraisal outcomes. Monitoring and evaluation, and management of human resources, were the courses asked for by headteachers from the LEA, with SDPs and OfSTED also being important priorities. Courses that the LEAs least commonly offered included: purchasing and contract management; appraisal of support staff; and personal development planning. The most heavily subscribed courses within the LEAs were about OfSTED inspections and curriculum related courses.

The courses for headteachers were exclusively delivered, in 25% of the LEAs who responded to the survey, by LEA advisers/inspectors, with other providers coming from LEA agencies, educational consultants, other external agencies, and Higher Education Institutions.

A variety of approaches to headteacher management development was in evidence with over 50% of the LEAs using a competence-based scheme of management development, and 33% using a portfolio of evidence. Some LEAs were developing the portfolio in relation to NVQ requirements at Levels 3, 4, and 5. 88% of the LEAs offered on site management development provision, with less than 25% of the LEAs offering headteacher exchanges. Most of the LEAs offered mentoring and peer support for its headteachers. Opportunities for secondment were available but only 5% of LEAs would grant secondment to a Higher Education Institution. Most secondments were for LEA projects or to OfSTED. Several LEAs offered secondments to headteachers who spent time in industry. Open and flexible distance learning packages had been invested in by about 50% of the LEAs.

The impact of GEST funding 1995/6 was commented on in the survey with nearly 50% of the LEAs stating that the reduction in funding would impact upon courses offered, often with a reduced staff. The main concerns regarding management development and training for 1995/6 was

that headteachers would not spend money on their own professional development, and that it was,

Increasingly difficult to persuade headteachers to come out of their schools for training that lasted more than half a day

(EMIE, 1997, p.13)

The lack of funding particularly with regard to the loss of separate funding for mentoring was worrying LEAs (EMIE, 1997). Some LEAs were concerned about the quality of some of the HEADLAMP providers. Uptake generally by headteachers of accredited courses in some LEAs was very low with 'a fairly low completion rate'. It would appear from the survey that LEAs were trying to maintain their management development programmes whilst coping with changes in funding and Teacher Training Agency (TTA) initiatives including the NPQH. The move towards accredited training for headteachers was significant in a number of LEAs. LEAs would be running fewer courses and there was to be a greater emphasis on running school improvement projects.

Earlier, in 1995, the Developing Senior Managers study sponsored by Understanding British Industry (UBI), Unilever, OfSTED and the DFE surveyed 1,100 school heads, deputies and Chairs of Governors. The questionnaire revealed that headteachers considered their own development needs last, and that 75% of heads in post for more than 15 years stated that they had no professional development needs or did not answer the question. Training needs identified by the respondents included:

- ◆ Strategic management;
- ◆ Monitoring, evaluation and review;
- ◆ School development and business planning;
- ◆ Policy development and implementation process;
- ◆ Development of middle managers;

- ◆ Delegation and accountability of management roles;
- ◆ Leadership.

(EMIE, 1995 p.1)

The two studies cited above covering LEAs and individual schools at primary and secondary level, are in accordance with each other regarding the priority areas of management development and training, being the management of human resources and monitoring and evaluation.

Since the introduction of headteacher appraisal in England and Wales by The Education (Schoolteacher Appraisal) Regulations Act in 1991 (DES, 1991) all headteachers have been appraised. The literature relating to headteacher appraisal indicates that headteachers have perceived that the appraisal process has led to some positive experiences (Baker *et al*, 1994). Benefits, as determined by the headteachers, of the appraisal process have included: the opportunity to reflect on one or two longer term issues; the chance to have a second opinion on their management practice; having someone to give them praise, and being able to compare practices with other heads. Being an appraiser of a headteacher colleague was also noted as a benefit for some of the headteachers. The appraisal process did then allow for a reflective process to take place, and enabled personal and professional dialogue to occur relating to headship.

The national contextual framework includes the setting of National Standards for Headteachers (TTA, 1998), setting out the knowledge, understanding, skills and attributes which relate to the key areas of headship. The core purpose of headship is:

To provide professional leadership for a school which secures its success and improvement, ensuring high quality education for all its pupils and improved standards of learning and achievement

(TTA, 1998b, p.4)

Standards and professional leadership are highlighted in the Governments initiatives. The TTA is committed in its corporate plan 1998-2000 to improve teaching quality through its initiatives in every area of teachers' professional development, from recruitment to initial teacher training and induction through to headship. One of their aims is, 'To promote well targeted, effective and co-ordinated continuing professional development' (TTA, 1998a, p.3).

Other initiatives include the establishment of Leadership Centres. In 1996 the London Leadership Centre was opened with a brief to help raise achievement in the capital's schools through the promotion of leadership skills, intellectual growth and the overall effectiveness of headteachers. In October 1998, Tony Blair, the Prime Minister, announced the establishment of a new National Leadership College for headteachers to be opened by the year 2000, investing £10 million in start up costs from the Government. OfSTED itself state that,

The leadership qualities and management skills of the headteacher are major factors contributing to a school's performance

(OfSTED, 1998, p.4)

The Green Paper 1999 'Teachers – Meeting The Challenge Of Change', with its four predominate themes of:

1. school leadership;
2. rewarding good performance by teachers;
3. improving professional development; and
4. providing better support for staff in schools;

is relevant since theme no.1 school leadership, includes the following. Extending the leadership pay arrangements, putting into place a national framework for training new and experienced headteachers, the

establishment of a National College for school leadership, the opportunities for good headteachers to earn higher salaries for tough jobs, the introduction of fixed term contracts for headteachers, and trained outside support for governing bodies in appraising headteachers.

What is the role of the headteacher in school improvement and what implications does this have for training?

The research tradition on school effectiveness and school improvement has been markedly different within the United States of America (USA) and in Britain. There are, as Reynolds points out (1992), a variety of reasons for this, including the fact that traditionally researchers in Britain have not always been given free access to undertake comparative research within the schools (Power, 1972). The early findings of Jencks (1971) and the DES (1967) showed limited school effects, and minimal effects by schools upon pupil development.

In Britain unlike the USA, the absence of reliable and valid measures of institutional climate did not help to promote an understanding of within school processes and the measurement of the characteristics of effective organisational processes. Schools in Britain were not looked at independently as to the effects of schools' organisational processes until the 1970s, and there was little development in this area until the 1980s with the work of Burgess (1983) and Ball (1981).

School effectiveness research, developing from modest beginnings in the 1970s and the early 1980s has been important since it demonstrated that schools do make a difference to the progress of individual pupils. The underlying assumption is that effective schools include effective structures and processes for managing, adoption, and implementation of innovations for school improvement. School effectiveness research as Lezotte (1989, p.820) portrays is a,

vision of a more desirable place for schools to be but little insight as to how best to make the journey to that place.

That would seem to be the central concern of school improvement. School effectiveness research characterises those who teach in and manage schools as the key actors in the production of a better education. As school effectiveness researchers were making conceptual and methodological progress the demand for school accountability at the national and local level was growing. This came not only from central and local Government (ERA, 1988) but also from schools and parents.

Much of the school effectiveness research has been conducted on urban elementary schools in the USA. Where there have been major longitudinal studies in the UK on inner London schools (Rutter, 1979), this effective school research was carried out prior to the 1988 Education Reform Act. The lack of longitudinal studies means that little is known about how and why schools become more or less effective over time. Most effective schools research has not been designed to identify effective management structures and processes, so there is little evidence of what these process factors might be.

Effective schools research has concerned itself with the question of the characteristics and conditions of schools associated with effectiveness, where an effective school is defined by Mortimore (1991) as one in which, 'pupils progress further than might be expected from consideration of its intake'. McPherson (1992) states that an effective school 'adds value' to the children. Effectiveness is a value-laden concept and so will prove to be problematic. DfEE research findings (1998) show that the effective management of schools is increasingly found to be influential for the learning and development of pupils.

Further research evidence (Fullan 1991, 1992) confirms that effective schools do not just happen, but are effective because of the effective management structures, which impact on the teaching and learning (Harris, Jamieson, and Russ, 1996, p.85). A basic definition of effectiveness is, 'the production of a desired result or outcome' (Levine and Lezotte, cited in Stoll and Mortimore, 1998, p.1). The factors of school effectiveness (Fig. 1) suggest that there is a basis of research findings that can contribute to promoting institutional improvement.

The research on effective schools has then found that certain internal conditions are typical in schools that achieve higher levels of outcomes for their pupils. The literature is also in agreement on two further issues: firstly that these differences in outcome are systematically related to variations in the school's culture and ethos; secondly that the school's culture may be altered by a concerted effort by the school staff (White and Poster, 1997). Not only does the effective schools research conclude that schools make a difference, but there is also broad agreement as to the factors that are responsible for that difference (Stoll and Mortimore, 1998).

Key findings of effective school research relating directly to institutional level management is that headteachers: give direction; share leadership to some extent; involve staff in decision making and curriculum planning; establish a positive climate; support work of staff; attend to staff selection; buffer staff from distractions; monitor the school frequently; seek out resources, including external facilities; and are centrally concerned with teaching. Here factors have been identified that may help to direct organisational effort and could lead to the school running more effectively.

Stoll and Mortimore, (1998, p.5.)	White and Poster, (1997, p.4.)	Ribbins and Burridge (1994, p.5.)
♦ Participatory leadership	♦ Pupils at centre	♦ Collegiality
♦ Shared vision and goals	♦ Learning is enjoyed	♦ Positive leadership
♦ Teamwork	♦ Achievement is valued	♦ Staff stability
♦ A learning environment	♦ High expectations	♦ Planning
♦ High expectations	♦ Strong reliable leader	♦ Parental involvement
♦ Positive reinforcement	♦ Clear vision	♦ Support of LEA
♦ Monitoring and inquiry	♦ Discerning overview	♦ Commitment to common aims
♦ Learning for all	♦ Good communications	♦ Pursuit of schoolwide aims
♦ Partnership and support	♦ Effective administration	♦ Maximum use of learning time
♦ Emphasis on teaching and learning	♦ Governors as enablers	♦ Strategy for continuing staff development
♦ Pupils rights and responsibilities	♦ Good relationships	
	♦ Variety of teaching strategies	

Fig. 1 Factors For School Effectiveness.

The hypothesis underpinning the effective school movement is that, effective school improvement interventions focus on improving structures and procedures for managing change. This coupled with innovations focusing on factors connected with teaching and learning revealed in effective school research, will enable schools to become more effective.

Within the field of effective schools research it has been noted that there are differing achievement criteria of effectiveness, and data analysis methods can lead to conflicting conclusions about whether a school is effective or ineffective (Levine and Stephenson 1987). Definitions of effectiveness are then value laden. Desmond Nuttall and his colleagues (1989) for example, in their study of ILEA secondary schools, found that the effectiveness of a school varies along several dimensions, and that there are also variations over time. These findings suggest that the school effectiveness criteria highlighted in the school effectiveness literature which correlate with more effective outcomes do not provide a blueprint for school improvement.

School effectiveness research although identifying the factors that make for effectiveness does not indicate how they affect other factors. Although there is consensus about effective school correlates, there is little discussion about the nature of the process that leads to effectiveness. Effective schools criteria provide a necessary but not sufficient condition for school improvement.

MacGilchrist, Myres and Reed, 1997, p.6 prioritise three core characteristics as being of central importance to effectiveness: leadership; concentration on teaching and learning; and a learning organisation. The last of these is important as it implies a link between effectiveness and change or improvement. No school can be truly effective if it does not strive for continual improvement. It is important to remember however, the comment by Fullan (1991), 'not all change is improvement but all improvement leads to change' (MacGilchrist, Myres and Reed, 1997, p.7).

Improvement can be viewed as,

a distinct approach to educational change that enhances student outcomes as well as strengthening the school's capacity for managing change

(Hopkins, Ainscow and West 1994, p.3)

This is a useful definition as it makes direct links between school-wide improvement and improvement in the classroom. Whatever their role, most people involved with a school see the improvement of that school as a priority. The term 'school improvement' is used as shorthand for an international body of research and an associated approach to school development, concerned with raising the quality of education in all schools (Hopkins 1987). School improvement studies tend to be more action and developmentally orientated than the effective schools research. They embody the long-term goal of moving towards the vision of the 'problem solving' or 'thinking school' through developing strategies that strengthen the school's organisation, as well as implementing curriculum reform. A now fairly well-established definition for the term 'school improvement' was set out by the OECD - sponsored International School Improvement Project (Van Velzen, Miles, Hameyer and Robin 1985).

a systematic sustained effort aimed at change in learning conditions and other related internal conditions in one or more schools, with the ultimate aim of accomplishing educational goals more effectively

(Van Velzen, Miles, Hameyer and Robin 1985, p.46).

For improvement to be effective necessary factors have then been identified (MacGilchrist, Myres and Reed 1997, and Hopkins, Ainscow and West 1994), particularly shared vision and goals, participatory leadership, teamwork and collegiality. It is important for all members of

the team to have shared views on quality in education and be working towards the same goals.

The process of continual school improvement must be built on values and vision that the school holds. Development planning has been practised in schools for some years, but to ensure that this leads to improvement as well as change it needs to be encompassed, into a more holistic process of strategic planning and management. Strategic management focuses on deciding strategy, involving examining possibilities and choosing the most appropriate strategy for a given situation. The model encompasses the importance of improvement based on existing values and uses both internal and external analysis to create a shared vision. In the planning stages the views of all stakeholders (pupils, parents, governors, community etc.) are considered, as well as current and future external requirements. Training for headteachers would need to promote this to ensure school improvement.

The introduction of the OfSTED inspection process has ensured that criteria for making judgements on school management are clear, explicit and in the public domain (OfSTED, 1995). It could be argued (Bolam, 1997) that OfSTED inspections according to the national framework of inspections for schools in England have resulted in school improvement projects, since the inspection schedule is implicitly based on models of effective school management. The schedule includes a section on management and efficiency of the school including: leadership and management; staffing, accommodation and resources; and efficiency of the school. The national and local data of OfSTED inspection grades for primary schools relating to leadership and management (1997-1998) will be examined in Chapter four.

The question as to whether leadership really matters and whether it makes a difference is commonly asked. There are several schools of thought from a) those who believe that headteachers as leaders make a

difference (Harris, Jamieson and Russ, 1996) b) those who think that they may but that there is not enough hard data to conclusively state this (Hallinger and Heck, 1996) and c) those who believe that the weighting placed by some on the importance of headteachers as leaders is very much over emphasised (Davies, 1995).

Kerr and Jermiers (1978) empirical study determined that approximately half of the direct or indirect individual leadership interventions by headteachers were successful. Successful interventions were those characterised where significant impact had been realised. Where impact was less successful they put forward the idea that there were alternative causes which included: the type of task; the personnel involved, or the nature of the organisation. Gardner (1995, p.303) states,

An enhanced cadre of future leaders can materialize only if we engender widespread appreciation of the principal issues that surround effective leadership.

Gardner (1995, pp.304-305) goes on to discuss how leaders would benefit from knowledge about leadership, what it involves, what can go wrong and what can go right, which he calls 'consciousness about the issues and paradoxes of leadership'.

Hallinger and Heck (1998) in their article reviewing research on the relationship between principal leadership and pupil achievement 1980-1995 focused on substantive findings from empirical studies in a variety of countries (England, USA, Canada, Singapore, Netherlands, Marshall Islands, Israel, and Hong Kong) conducted during this period. The conclusions drawn illustrated a change in the theoretical and methodological frameworks used by the researchers into principal effects, showing more sophisticated thinking about the role of the principal. After 1987 Hallinger and Heck noted a move from more

simple direct effect models to mediated-effects conceptualisations of the principal's role.

The direct effect models proposed that the leader's practices can have effects on school outcomes, although these studies did not demonstrate conclusive results. Whereas the mediated-effects framework hypothesizes that leaders achieve their effect on school outcomes through indirect paths i.e. other people. Principal leadership can also influence pupil learning outcomes through their role in shaping the school's direction, through its goals, vision, mission, school structure, and organisational structure. One of the key points that emerges from Hallinger and Heck's research is that the influence of the head is mainly indirect than direct e.g. deciding who teaches which class, obtaining resources etc, and this is highlighted also in Ouston's critique of school effectiveness research (Ouston, 1993, p.216). The review suggests that

Previously described discrepancies in research results may be explained by the conceptual and methodological tools employed by researchers. We also emphasise the limitations of these studies.

(Hallinger and Heck, 1998, p.157)

It is therefore important to continue to investigate the principal's contribution to school effectiveness and the impact on pupil outcomes through conceptual and methodological frameworks.

Leadership.

In 1997 the Chief Inspector of Schools identified 3,000 headteachers as poor leaders. Leadership is a word that is being heard increasingly often in education, and features across all of the themes in this chapter. In part, this is a reflection of the changes in educational organisation, with local management of schools (LMS) and the erosion of local authority support, the quality of individual schools relies far more heavily on the quality of

the head. A further development has been the idea that effective leadership is something that can and should be learnt. Indeed this has resulted in a major new strategic initiative by the Teacher Training Agency (TTA) to develop the National Professional Qualification for aspiring Headteachers (NPQH), and the National Leadership Programme for Serving Headteachers (LPSH).

There is at present widespread agreement amongst educationalists and education Government leaders that the quality of leadership is a crucial factor in making schools more effective. An example of this view can be seen in Harris, Jamieson and Russ (1996):

the headteacher's leadership style is centrally important in the perceived and realised improvement of the school...

Learning outcomes are found to be more favourable when there is a combination of firm leadership with a decision making process in which all teachers feel that their views are represented. Effective headteachers, it has been shown, are adept at managing people, command trust and have high expectations of staff.

(Harris, Jamieson and Russ, 1996, p.86)

In the White paper on education, 'Excellence in Schools,' (DfEE, 1997a), the Government sets out its vision for learning and is explicitly expecting LEAs, governing bodies and headteachers to work to its vision:

The vision for learning set out in this white paper will demand the highest qualities of leadership and management from headteachers.

(DfEE, 1997a, p.46)

Educational leadership theorists expound the need for the headteacher to have a clear vision for their school and to persuade others to join her in

seeking to achieve it. Peters (1989, p.400) for example states, 'Developing a vision and more important, living it vigorously, are essential elements of leadership'

What are the most commonly held leadership perspectives?

Systematic perspectives on leadership from the current literature on organisations and educational literature can be determined, from for example, Bolman and Deal (1991), Bush (1995), Carlson (1996), Cheng and Shum (1997), Shen (1998). The seven leadership perspectives are:

- ◆ Personality Perspective
- ◆ Organisational Perspective
- ◆ Political Perspective
- ◆ Human Resources (Subjective) Perspective
- ◆ Symbolic Perspective
- ◆ Managerial (Administrative) Perspective
- ◆ Moral Perspective

(Hsieh and Shen, 1998, pp.108-9)

The personality perspective looks at leadership as a function of a leader's personality i.e. personal characteristics, which would include traits, attitudes, behaviour, skill, high energy, intellect, charisma, trustworthiness, and vision among others. Indeed, Bolman and Deal (1991, p.408) state that,

Traditional notions of the solitary, heroic leader have led us to focus too much on the actors and too little on the stage on which they play their parts.

Successful leadership Immegart (1988) found after reviewing research findings included the following, 'traits of intelligence, dominance, self - confidence, and high energy/activity'.

The organisational perspective may also be known as 'structural perspective' or 'formal perspective'. This framework views leadership from the perspective of the official and structural elements of organisations. It is focused on a rational view of management, using rational analysis and formal mechanisms through a hierarchical structure. It has the assumption that leadership is embedded in the structure of the organisation. Ogawa and Bossert (1995) argue that this is more than a requirement for a few people at the top of the organisation. They argue that leadership roles should be assigned to various posts throughout the organisation, and that the outcomes of leadership should not focus solely on goal attainment.

The political perspective views leadership as bargaining, compromising negotiation and exerting influence on the basis of power. Here power and conflict are most important concepts in this perspective. Power may come from a) the position in which the person finds himself or herself within the organisation, b) based upon experience, or c) based on his or her own personal characteristics or behaviour. The political perspective recognises that individuals both within and outside the organisation have their own focus of interest. Seats of power which may lead to conflicts will need to be handled by the leader using bargaining, negotiating and forming coalitions as necessary (Hoyle 1986; Ball 1987).

The human resources or subjective perspective focuses on the individual rather than the organisation, viewing leadership as motivating individuals, and harnessing their commitment. The leader helps individual members to construct meanings with the purpose of aligning the goals of the individual and the organisation.

The symbolic perspective views leadership as imagery, whereby the organisation is a stage and a theatre in which each person has a role to play and attempts to communicate the right impression to the right audience. Burns (1978) used the term transformational leadership and it

is also known as visionary leadership. Symbolic leaders will communicate a vision of the organisation to their employees and other stakeholders that builds faith and loyalty, as well as providing a rationale for their work. The symbolic leader therefore is a creator of possibilities (Bolman and Heller 1995).

The managerial or administrative perspective views successful leadership as creating mechanisms to co-ordinate groups and link individual effort to shared goals of quality service. A manager is concerned with maintenance, follows the script and reflects legal and bureaucratic authority. A manager will also exercise power of sanction and reward, and develop the timetable and budget (Kerry and Murdock 1993).

The moral perspective on leadership maintains that there is a genuine sharing of mutual needs, aspirations and values between the leader and the led. This decade there has been a resurgence of this perspective in recent literature (Goodlad, Soder and Sirotnik 1990, Hodgkinson 1991). There are some ethical principles of management that apply specifically to schools, since schools have a requirement to contribute to children's moral education. Sergiovanni (1991) argues therefore that school leaders should be moral leaders.

Fidler (1997) puts forward further questions that need to be asked, such as whether leaders should have certain moral qualities, and whether the management of a school should be conducted in a 'specially moral way in view of the moral education of children within them' (Fidler, 1997, p.31). Some writers such as Duignan and Macpherson (1992) attach importance to the moral qualities of the leader and the moral processes which go on in schools. They put forward the suggestion that an education leader needs management, leadership, and a 'realm of ideas'. The 'realm of ideas' would constitute judgements about what is of value and what is significant in the education of children within the school.

Hsieh and Shen (1998) in a study in the USA asked teachers, principals and superintendents about what the important skills, knowledge, and values are for educational leaders, and then related responses from these three groups to the seven perspectives on leadership. Although the sample size was small and the research was carried out in a different school system the results show that there were more differences between the three groups in the skill and knowledge domain than in the value domain. What was significant in this study is that the differences in the skill and knowledge were attributed to their leadership positions within the school system. The principals in the study viewed leadership through monitoring and maintaining values and carrying out practical tasks in the school system (Bush 1995), and they also felt that a leader's personality played an important role in leadership (Shen, 1998).

The data from the study by Hsieh and Shen (1998) showed that principals viewed leadership from the managerial, personality, and moral perspectives. The superintendents tended to view leadership from the moral and political perspective. The teachers viewed good leadership from the personality and moral perspectives. What is interesting here is that each group defines good leadership in a different way illustrating that they have different conceptions of leadership, depending where they are in the hierarchy.

With the change in perception as to what is good educational leadership as a teacher progresses through the school hierarchy, there are implications for the continuing professional development needs of future school leaders. That the headteacher is the leading professional (Hughes, 1985) in a school, implies that they should facilitate teaching and learning in the classroom. However, we have seen that as teachers have been promoted there has been less emphasis on instructional leadership, and more on managerial and political aspects of leadership.

Research by Jenkins (1997) indicates that headteachers in England and Wales have taken on the role of chief executive as necessitated by the Government legislation of recent years. However, since OfSTED inspections in 1993, the focus has been changing due to the emphasis on classroom practice and processes. This external influence has impacted upon headteachers who have begun to refocus upon teaching and learning.

Curricular leadership or instructional leadership as it is called in the USA can be viewed from a functional or process approach. The functional approach is characterised by tasks, and the process approach by the ways in which these tasks are to be carried out. Krug (1992) identifies five components of the functional approach to instructional leadership:

- ◆ Defining mission;
- ◆ Managing curriculum and instruction;
- ◆ Supervising teaching;
- ◆ Monitoring student progress;
- ◆ Promoting instructional climate.

The five components give a functional view of curriculum leadership but do not give an indication of how they may be achieved. The process approach as promoted by Firestone and Wilson (1985) puts forward three ways in which the leader may influence classroom processes, that of bureaucratic and structural, direct interpersonal, and cultural linkages. Examples of bureaucratic and structural linkages include policies, procedures, plans, evaluation (Leitner, 1994). Direct interpersonal linkages may be achieved through classroom observation. Cultural linkages, 'involve shared meanings and assumptions' (Fidler, 1997), so that priorities are stated and backed up with the appropriate resources and time. Firestone and Wilson (1985) propound that bureaucratic and cultural influences should strengthen each other.

Bolman and Deal carried out some research in the USA and Singapore evaluating instructional leadership of the principal through their four frames (Bolman and Deal, 1991) of structural, human relations, political, and cultural. What they concluded from their study was that principals had been 'well prepared in the structural and human relations approaches to leadership', and under prepared in the symbolic and political. This is in keeping therefore with Hsieh and Shen's (1998) study, and would suggest that future school leaders be better prepared in the political and symbolic aspects of their work, particularly so when change is currently an ever present feature of the education system.

Leadership and management development have moved centre stage in education through the TTAs new qualification for top and middle management which is quite an ambitious programme, and is the first time that anything like this has been seen in the English education system. The TTA maintain that the school improvement dimension is an important aspect of the NPQH, with regard to the teacher's present or future school. Indeed the terminology used in the National Standards for Headteachers can be attributed to a range of conceptualisations and theoretical perspectives of leadership. Whether it is possible to directly link school improvement with the NPQH remains to be determined through the review of the programme by OfSTED. There are questions that may be asked, for example, as to the time frame for some of the projects, which may require longer for the results to be meaningful or indeed proven.

Further questions may be asked about approaches to leadership as to whether it makes a difference how long the headteacher has been in post, and whether headteachers change their approach to leadership in the light of experience. In the USA some of the school systems systematically change the principals who are moved from school to school so that they can develop their skills (Hart, 1993). Robert Macmillan (1998) in his study of five secondary principals in the USA found that there was a change over time and that the principals gradually constructed a sense of

their role and of the place of that role in schools. The principals gained in confidence, and satisfaction in their ability to effect change and to involve others in it was also evident. The study goes on to suggest that the experience of the principal should be matched to the school context. Although the study was very small and conducted in a different education system, the question of matching headteachers' experiences to the school context and of whether experience in multiple school settings has an impact on headteachers career development would need to be studied further.

Leadership style may also be influenced by the follower's level of development, which can be determined by their competence i.e. knowledge and skill, and their commitment i.e. confidence and motivation. The four leadership styles of delegating, supporting, coaching and directing (Blanchard, 1983) will be adapted according to the needs identification of the follower by the leader.

Summary.

The literature review outlines some of the major changes to education since the 1988 ERA, and how these have impacted on the role of the primary head. We can determine from the school effectiveness research that school can make a difference to pupil achievement, and that leadership is an important factor in this process whether it is indirect or direct leadership (Hallinger and Heck, 1998). The school improvement agenda has been seized upon by the Government and underlines the importance of headteachers. One of the perceptions is that the primary headteacher needs to be proactive, which has increased the pressure on heads, and one can ask whether this can be learnt and also can and how do primary headteachers do this. Indeed questions may be asked as to what kind of training do people need to help them become leaders, and whether effective leadership is something that can be learnt.

Implications and questions raised from the literature review for the study into CPD for primary headteachers highlight or reinforce the view that the headteacher is a key component in school effectiveness. Other factors relating to leadership involve the notion that the experience of the head should be matched to the school context, and the experience of the head in multiple school settings. These factors will be explored in interviews with current headteachers.

Research in the USA (Hsieh and Shen, 1998) tells us that headteachers are better prepared in the structured and human relations approach, and under prepared in the symbolic and political aspects of leadership, and that different conceptions of leadership are in evidence depending upon where one is in the hierarchy. We need to ask whether these research findings are comparable to the experience of current primary headteachers. What type and how much training primary heads need, and what their own perception of their training need is, are further questions to be asked. One may also ask whether primary headteachers perceptions of their own training needs are linked to job satisfaction and their own sense of self perception, relationships and sense of efficiency, and whether there are other factors that impinge on the job.

The investigation into the CPD needs of primary headteachers focuses on the changing role of the head, and the development of a new professionalism, with research findings generally stressing the importance of the role of the head in school improvement and school effectiveness. The study will focus on changes to primary headship, school effectiveness and improvement, leadership and training. The following chapter will discuss the research design and the methodological background. The research perspective will involve both qualitative and quantitative methods, making primary use of questionnaires and interviews, and through being a member of an LEA working party. Evaluation research will also take place through an analysis of the OfSTED reports for the primary schools within the LEA.

CHAPTER THREE.

METHODOLOGY.

General introduction.

As previously stated, the focus of the study is to explore, in one LEA, what are primary school headteachers' perceptions of headship, what they perceive their training needs to be in the context of raising standards, and to determine how these needs may best be met. The literature review considered studies into headship, school improvement and effectiveness research, and the impact of changes in education since the 1988 Education Act on the primary school headteacher. The key issues that emerged included the changing nature of headship, that school can make a difference to pupil achievement and that leadership is a factor in this process, and in the development of a new professionalism.

This chapter will discuss the research design and the methodological background to the study. The research perspective will involve both qualitative and quantitative methods, making primary use of questionnaires, interviews, and documentary analysis. The research design included data being collected about the CPD needs of primary headteachers from a variety of sources, for example OfSTED reports, questionnaires and interviews to heads, and through minutes of LEA project meetings attended by LEA headteachers. Ethical considerations and the use of questionnaire and interview techniques will also be examined in the chapter.

Methodological background.

The inquiry has been undertaken with specific methodological perspectives underpinning the study. Theoretical and methodological considerations within the social sciences have been well-documented (Anderson, Hughs and Sharrock 1986, Medawar, 1984) and have evolved during the 1990s. Two factors that are relevant to the work in hand, are firstly, that of the notion of 'introspection'; and the second, the

construction and reconstruction of 'social reality' which acknowledges that the researcher is a key player in the manipulation of the research process. Both of these factors raise issues about the role of the researcher in the process, and how one may influence the research.

Discussion of methodology involves a consideration of research design, data collection, data analysis and theorising, together with the social, ethical and political concerns of the social researcher (Walford, 1991). Research in the social sciences may therefore be viewed as a social process in which the researcher plays a key role. Consideration needs to be given to the ways in which techniques, theories and processes are developed by the researcher in relation to the experience of collecting, analysing and reporting data.

Stenhouse (1982), who wrote of the bias in teachers as researchers where the justification of actions was affected by the vested interests of the teachers, has noted the idea of psychological predisposition. It would therefore be important for the researcher to recognise the assumptions, perceptions, and knowledge that they bring to the inquiry. As Burgess states, 'research is infused with assumptions about the social world and is influenced by the researcher' (Burgess, 1984, p.2). This self-analysis or introspection on the part of the researcher develops the notion of Schon's (1983) reflective practitioner to include self-awareness in relation to psychological predispositions. The researcher should be aware of their own standpoint and of their involvement in the situation. It was therefore important to ensure that my own assumptions, perceptions, and in a minority of cases, prior knowledge of the school and the headteacher, were recognised and acknowledged. The research design was planned, taking account of the above, so that the researcher's psychological predisposition would have minimal impact on the research process.

Kuhn suggests that it is the creation of paradigms that will encourage the discovery of more 'truth' in what we see (Kuhn in Anderson, Hughs and

Sharrock 1986). What constitutes truth will not be discussed, but rather to consider the processes and players involved in the creation of social realities. By formulating a hypothesis, which may contain assumptions, the researcher is according to Kuhn, psychologically predisposed to the idea of wanting to endorse its truth. It is therefore important as a researcher to take account of these paradigms.

During a qualitative research inquiry 'knowing' may change as the inquiry progresses, and as the researcher shifts focus, giving rise to different realities. Sanford (1987) has shown that experience, expectation and knowledge create individual 'frames' through which individuals perceive the world. It may be argued that the adoption of a range of 'frames' increases the individual's ability to communicate. Researchers may adopt different frames and different combination of frames and Burgess (1984) for example discusses how his frames changed during the course of his research. Burgess also notes that researchers are, 'by no means immune to the effects of interests and values' (Burgess, 1984, p.41). This is discussed later in the work where the advantages and disadvantages of interviewing as a research strategy are examined.

Brief outline of the research design.

The methodology adopted to investigate the four research questions included: a postal questionnaire to all sixty-nine primary headteachers; in-depth interviews with ten headteachers, and the LEA senior primary inspector; and an analysis of documentary evidence. The postal questionnaire sent to all sixty-nine primary headteachers in the LEA, sought to obtain information about headteachers' own personal perceptions of headship at a particular moment in time. Following the questionnaire, ten in depth interviews with a representative sample of primary headteachers enabled focussed dialogue to take place between the researcher and the selected primary headteachers. Steps were taken to ensure that the sample was representative of the heads in the LEA, and this is outlined later in the chapter.

Documentary evidence included an analysis of the LEA primary OfSTED reports 1995-1998 (figure 2), using for the analysis the framework devised by Glover, Bennet, Crawford and Levacic (1997). A focussed analysis of the leadership and management section of the eighteen primary schools which were inspected in 1997-1998 in the LEA was also undertaken, and these findings compared to the national figures. The chosen methodology was selected so that an independent snapshot view of school leadership and management could be considered. A further source of data was the minutes of a LEA steering group comprising headteachers and inspectors on leadership and management. Although this element was not originally part of the research design since the researcher had no knowledge of the project prior to contact with LEA, she was however co-opted onto the project and the data was included in the study. The data from the various sources will enable a broad picture of headship in the LEA to be established. The three main methods of data collection were questionnaire, interview, and an analysis of the 1995-1998 OfSTED reports in the selected LEA.

(1) Gaining access and developing the questionnaire.

A meeting took place between myself and the Chief Inspector of the New Unitary Authority to determine whether he would sanction the proposed research questionnaire going out to all primary schools. Under discussion were the purpose of the research, the inclusion of a covering letter explaining the rationale for the questionnaire and the proposed following ten interviews, the identification of heads to trial the questionnaire, and its method of distribution. Ethics and confidentiality were also discussed with the Chief Inspector, and the researcher was invited to speak to the senior primary inspector, who was about to set up an LEA working party of primary headteachers and inspectors to focus on leadership and management. The questionnaire and accompanying letter were sanctioned by the Chief Inspector, and a number of headteachers (half a dozen) were identified by him to trial the questionnaire, with agreement that the questionnaire would be distributed through the LEA internal weekly mail

run. The LEA also sanctioned that they would supply additional information relating to Form 7 returns and OfSTED reports as requested by the researcher.

The procedure for devising the questionnaire involved listing the information required under broad headings and then identifying specific items. Once a broad framework was identified the questions were inputted into Pinpoint 3, an appropriate computerised package. The package was chosen for a variety of reasons that included the following: ease of use; availability; fitness for the purpose; ability to enter and analyse qualitative and quantitative data. When formulating the questionnaire, care over the choice and use of language was essential to ensure that it was appropriate to headteachers. The questions needed to be clear, concise and unambiguous (Patton, 1990).

From the pilot of the questionnaire, which went to the heads executive, there were several issues that needed to be addressed before the questionnaire could be sent to all headteachers. For example, an issue arose over question 25, that asked, 'What are your current professional development needs in relation to the TTA standards?', as it was identified in the trial that not all headteachers knew of what the standards consisted. An option was to include the standards with the questionnaire, but this would have added considerably to the amount of information and paperwork being distributed to the headteachers. The modified question identified the TTA standards.

An issue that did raise concern about the pilot questionnaire was the opposition raised by the local Chair of the Headteachers' Conference. The Chair of Conference took personal exception to someone from outside the LEA carrying out, and being privy to, information about headteachers in the LEA. Ethics and confidentiality were issues discussed with the Chief Inspector, and were more explicitly outlined in the letter accompanying the questionnaire. A further issue identified in the trial was that of

confidentially, and headteachers wanted to have the option to sign their names or to submit the questionnaire anonymously. These issues were resolved through discussion and written assurances that no school or headteacher would be named in the study.

In compiling the questionnaire three different types of question were included (exploratory, explanatory, and predictive inquiry) some of which would serve more than one purpose. Exploratory inquiry can lead to a more focused predictive study, illustrated by the follow up in depth interviews with headteachers. The questionnaires, to all sixty-nine primary schools within the LEA, with covering letter, were sent through the LEA mailbag to all primary headteachers three weeks before the end of the 1998 spring term. This allowed sufficient time for them to be returned by pre-paid postage to the researcher. After two weeks a reminder letter, again delivered through the internal LEA postal system, was sent to all headteachers who had not identified themselves on the returned questionnaires. The returns from the headteachers netted a 61% response rate.

When devising the questionnaire there were a number of factors that needed to be taken into account. The first was to ensure that the heading of the questionnaire was illustrative of the subject of study (Fody 1995), and that a covering letter of introduction accompanied the questionnaire. Questions needed to be of limited length, and spaced appropriately as dense print may affect the response rate. Clear instructions for filling in the form needed to be given. Questions relating to broad themes are grouped together to enable a systematic/logical sequence, as well as helping in the analysis where question routing enabled a more thorough analysis. Questions need to be ordered so those straightforward non-controversial (often-closed questions) come first, with the more sensitive (often open-ended) questions following. Using a variety of questions sometimes with a fixed-point scale, for example Question 25 would

enable a quantitative indicator to be realised. It is also, for example Question 24, useful to have an 'other' category with 'please specify'.

The questionnaire should then reflect a range of questioning styles and techniques. Some questions, for example Questions 27-31, were open ended and unstructured and would provide qualitative information, others for example Questions 1-9, were highly structured and would give quantitative information. The type of questioning therefore reflects the nature of the research question, and the audience of headteachers, for whom the questionnaire is intended. The closed questions impose a limitation on the responses that the headteacher may make, whilst the open ended questions allow the headteacher to give the information which they feel is relevant. An assumption researchers commonly hold is that respondents have the information they want (Converse and Presser 1986:35). Multiple choice questions need to be carefully constructed ensuring that an even number of choices is available to ensure that the middle number is not chosen (a common occurrence if odd choices are given). The choice of language used on the questionnaire needs to be matched appropriately to the headteacher audience for whom the questionnaire is intended, so that the questions are clear, concise and unambiguous.

In setting up the study initially a decision about who will provide the information, as well as how and when to approach them is as important as deciding what information it is that one needs for the study. Key informants need to be identified. In this case headteachers within an LEA were identified as providing the main source of the information, aided by additional documentary data from the LEA. Obtaining access to the LEA data, distributing the questionnaires and arranging the in depth interviews, proved to be feasible with the support of the Chief Inspector, and senior primary inspector.

To ensure that the data collection would address the questions that are posed, it was decided to send a questionnaire to all primary headteachers and to do follow up in depth interviews with ten headteachers. As all headteachers were surveyed this ensured that the sample was representative of primary headteachers in the LEA. The number of primary schools in the chosen LEA determined the size of the interview sample, which was a percentage of the whole (14%). The results will be directly attributable to that particular LEA, but general claims may also apply to a larger population.

(2) Interview.

Face to face interviewing is one of the most popular methods of obtaining information from people. Interviewing is a two way process that allows the researcher to interact with the headteacher respondent, thus potentially facilitating a more focused/probing investigation than could be undertaken with a questionnaire. It was important to establish credibility, trust and rapport with the headteachers. A representative sample of headteachers was identified according to the following criteria: years in headship; gender; phase of school; type of school; size of school; whether they had an OfSTED report; percentage of free school meals. The criteria were applied so that the respondents fully represented the range of schools within the LEA, ensuring a balance.

A matrix was drawn up covering the above aspects for all 69 primary schools in the LEA (Fig. 2), and a range of schools identified to meet the criteria so that a balanced sample was chosen. Ten schools were identified (School 20, 24, 31, 33, 39, 43, 50, 62, 68, 69) ensuring a range of experience/inexperience, infant/junior/primary schools, group1/3, County/Aided, male/female, range of free school meals, with the common factors that all the headteachers worked for the same LEA and that all had received an OfSTED report.

Fig. 2:Matrix relating to the LEA primary schools from Form 7, 1998.

SCHOOL	YEARS <5/>5	GENDER M/F	PHASE I/J/P	TYPE C/A/GM	SIZE 1/2/3	OISTED Y/N	FREE SCHOOL MEALS %
1	>5	F	I	C	2	Y	20%
2	>5	F	I	C	2	Y	43%
3	<5	M	J	C	2	Y	49%
4	<5	M	J	C	3	N	16%
5	>5	F	P	C	2	Y	32%
6	>5	F	I	C	2	Y	16%
7	>5	M	J	C	2	N	11%
8	>5	M	P	C	2	Y	22%
9	<5	F	I	C	2	Y	13%
10	>5	M	J	C	2	Y	11%
11	<5	F	I	C	2	Y	23%
12	<5	F	J	C	2	Y	33%
13	>5	M	P	C	3	Y	24%
14	>5	F	I	C	1	Y	23%
15	>5	F	I	C	2	Y	24%
16	>5	F	I	C	2	Y	34%
17	<5	F	J	C	2	Y	34%
18	>5	F	I	C	2	N	29%
19	>5	M	J	C	3	Y	21%
20	<5	M	P	A	2	Y	4%
21	>5	F	P	C	2	Y	42%
22	<5	F	I	C	2	N	10%
23	>5	M	J	C	2	Y	10%
24	<5	F	P	A	3	Y	25%
25	>5	M	P	C	2	Y	31%
26	<5	F	I	C	2	N	11%
27	<5	M	J	C	3	N	16%
28	>5	M	P	C	2	Y	32%
29	<5	F	I	C	2	N	34%
30	<5	M	J	C	2	Y	31%
31	>5	F	P	C	2	Y	51%
32	<5	M	I	C	2	Y	33%
33	<5	F	I	C	2	Y	15%
34	>5	M	J	C	2	Y	42%
35	>5	F	I	C	2	Y	39%
36	<5	F	J	C	2	N	31%
37	<5	F	P	C	1	Y	63%
38	>5	F	I	C	2	Y	16%
39	>5	M	J	C	2	Y	18%
40	>5	F	P	C	3	Y	12%
41	<5	F	P	C	2	Y	40%
42	>5	F	I	C	2	Y	9%
43	<5	M	J	C	3	Y	13%
44	>5	F	P	C	2	N	40%
45	>5	F	I	C	2	Y	30%
46	<5	F	J	C	2	Y	35%
47	>5	F	I	C	2	Y	27%
48	>5	M	J	C	2	Y	31%

SCHOOL	YEARS <5/>5	GENDER M/F	PHASE I/J/P	TYPE C/A/GM	SIZE 1/2/3	OfSTED Y/N	FREE SCHOOL MEALS %
49	<5	F	P	A	2	Y	13%
50	<5	F	P	C	1	Y	44%
51	<5	F	I	C	1	N	35%
52	>5	M	J	C	3	Y	20%
53	<5	F	P	C	3	Y	49%
54	>5	F	I	C	2	Y	9%
55	<5	F	J	C	3	Y	15%
56	>5	M	P	A	2	Y	16%
57	<5	F	I	C	1	Y	41%
58	>5	M	P	C	2	Y	35%
59	>5	F	I	C	1	N	21%
60	>5	M	J	C	2	Y	19%
61	>5	F	I	C	2	Y	45%
62	<5	F	J	C	2	Y	42%
63	>5	F	I	C	2	Y	25%
64	>5	M	J	C	3	Y	22%
65	>5	F	I	C	2	Y	32%
66	>5	M	J	C	3	Y	33%
67	<5	F	I	C	1	Y	36%
68	<5	F	I	C	2	Y	26%
69	>5	F	I	C	2	Y	17%

Key:

Years<5/>5 = greater or less than five years in headship

Gender M/F = male/female

Phase I/J/P = infant/junior/primary school

Type C/A/GM = County/aided/ Grant Maintained school

Size 1/2/3 = less than 100/100-250 pupils/250-450 pupils

OfSTED Y/N = yes/no

Free school meals % = percentage of pupils receiving school meals

Shaded rows = headteachers who were interviewed

The interview sample included three female infant headteachers in County Schools, two with more than five years of experience, ranging in free school meals (FSM) from 15%-26%. Four primary headteachers, one male and three female, three with more than five years experience, and two Aided and two County schools, ranging from group one to three, with FSM from 4%-51%. Three junior school headteachers two male and one female, one with more than five years experience, all from County schools group two or three, ranging in FSM from 13%-42%. The data was extracted from the Form 7 (1998) return for the LEA, with the FSM factor being used as an indicator of needs. The approach therefore is illustrative of stratified random sampling, whereby the schools were divided into strata with part of the sample chosen from each layer. The ten headteachers chosen to interview represent a small number from which to draw conclusions representing a seventh of the total population of headteachers in the LEA.

It was noteworthy that one headteacher declined the request to be interviewed and 'did not want to become involved', with two headteachers unable to participate due to lack of time in their diary. The researcher approached new schools who met the identified criteria, and asked if the headteachers would participate in the research. All of the heads agreed to participate in the research by being interviewed. The positive response rate was high with headteachers making time to meet with the interviewer. The headteachers were telephoned personally by the researcher who explained her own background, the nature of the research, the main themes to be covered, and the confidentially aspect. The researcher negotiated with the headteacher as to the time and date of the interview. All of the interviews took place in the headteacher's office for approximately one hour. What was noteworthy was that although the questions were semi structured, at the end of the interview there was time for unstructured discussion, which 90% of the interviewees pursued.

In constructing the interview schedule consideration of the main themes arising from the questionnaire, Government initiatives, and key research questions identified from the literature search were grouped. The schedule may be accessed in Appendix 2.

Each of the headteachers was asked if the researcher could tape the interview, to which all agreed without hesitation. The headteachers were given an undertaking that they would receive a transcript of the recording and that the researcher would delete anything that the headteacher wished. It was interesting to note that headteachers were not particularly interested in receiving the transcript, and the common sentiment was 'don't bother with that'. As Lofland (1971 p.89) suggests, 'Tape record, then one can interview'.

There are both advantages and disadvantages to using a tape recorder for recording interviews. Firstly the advantages include that the data is an accurate reflection of the responses, and is relatively simple to collect. Disadvantages include background noise, positioning of the microphone, and the fact that tape recorders do not always function properly. Another factor to be considered is that of transcribing the tapes. To transcribe the taped interview into a written document can prove difficult due to the speed of the spoken word, and the fact that most people do not speak in sentences or paragraphs.

What was noteworthy in transcribing the interviews was that background noise of telephones and of teachers/secretaries entering the headteacher's room proved problematic. Even where there was a good tape recording it was difficult, when transcribing, to know when to include features such as question marks or full stops. The speed of some headteachers responses also proved difficult to transcribe, with some gaps appearing in the transcription. Another difficulty encountered on one occasion was the unreliability of the tape recorder, resulting in half an interview being taped, and the second half being recorded in note form. The time element

in transcription equated approximately to four hours for every hour interviewing.

In conducting the interview one needs to be aware of non verbal communication and how this may influence the process. Non verbal communication here is defined as a whole range of body language such as voice intonation, posture, stance, gesture facial expression, as well as, the attitude conveyed by clothes and general appearance. Where the interviewer and interviewee are seated, where the tape recorder is placed, as well as the encouraging signs such as nodding or leaning forward all need to be considered. These issues are important if one wishes to minimise the problems of participant bias, and need to be kept by the interviewer to the forefront when interviewing. These considerations were actively managed by the researcher through conscious consideration of the above when interviewing.

If the researcher is in an authoritative position in relation to the interviewee, simply by asking the questions, can bias people's answers, whereby they may give answers that they think you want to hear or that will be most flattering to themselves or their school (Foucault 1986 pp.169-256). The research design should have minimised the potential sources of bias, through using a variety of approaches with more focused questioning ranging from personal experiences to more abstract items. What one is trying to avoid is the 'Pygmalion Effect' whereby you influence your participants so that they behave in the way you predicted they would behave.

Bias from unrepresentative samples is one of the commonest ways in which bias enters a research study. In this study every attempt was made to reduce the effects of bias, through using a combination of approaches to gather the data. However, that the researcher knew some of the headteachers beforehand and not others may have had an effect on the quality of the responses. It was felt that this had a positive effect since the

headteachers were committed personally and professionally to engage in a dialogue with the researcher.

After the interviews, the researcher went through the transcribed data and identified the key themes. The transcribed data from the interviews can then be analysed within the framework of the research questions. Miles and Huberman (1984 p.16) in discussing qualitative data analysis state that,

We have few agreed on canons for qualitative data analysis, in the sense of shared ground rules for drawing conclusions and verifying their sturdiness.

The purpose of qualitative inquiry is to produce findings culminating in analysis, interpretation and presentation of findings. The challenge is to make sense of the data, by reducing the amount of information through identifying significant patterns and devising a framework for making known what the data revealed.

Ethical issues.

Collecting information from headteachers raises ethical issues that need to be considered (Kimmel, 1988). When investigating into the lives of headteachers and conducting in depth interviews research ethics, defined here as principles or values pertaining to rules of good conduct must be observed. For the past fifty years concern for the welfare of participants has become an important feature of research (Kimmel, 1988, Reynolds, 1979). Participants have a right to privacy, which is defined here as the freedom of each individual to decide the type and amount of information about themselves that can be shared with or withheld from others. To overcome this problem in the questionnaire design participants were able to complete the form anonymously. Here the privacy of the headteachers was assured since the data could not be tracked back to them. If participants cannot be identified they often feel more positive about taking

part in the research. With a postal questionnaire it is therefore easy to ensure anonymity.

As already stated one needs to be honest about the research interest, and state this up front. The question of confidentiality can influence how the research findings are presented. By including a statement on the questionnaire and in the covering letter that no individual or school shall be named, and allowing headteachers to sign/or not ensured that all headteachers had a right to not be identified.

The degree of confidentiality did affect the design of the research since the initial idea was to identify headteachers to interview from the questionnaire responses. In the trial it was negotiated with the Chief Inspector that the headteachers would have the option to remain anonymous. The method for selecting headteachers to interview was then reviewed.

The postal questionnaire enabled headteachers to fill in the questionnaire in their own time, although it presupposes that the headteachers understood the questions in the terms intended and that they understood what information is required. This presumes that the headteachers are in possession of the information required and that they are willing to divulge it. From the trial questionnaire it was apparent that the answer to both the above questions was positive, therefore enabling the questionnaire to be designed so that it was relevant to the research question and appropriate to the headteachers to whom it was to be administered. As it was impractical to administer an 'in situ' questionnaire, even though the response rate traditionally is much higher, a more practical solution was for a postal questionnaire. Hoinville and Jowell (1978) distinguish a number of factors that contribute to a good response rate: appearance, design and layout, covering letter, initial mailing, follow up letter, all of which were considered and included in the research design.

What was noteworthy from the returned questionnaires was that 50% of the respondents took the option of remaining anonymous, and 50% signed their name, clearly identifying themselves. They may have signed their name so that they could be identified and approached for the follow up in depth interview, or simply that they stood by their beliefs/values/statements, as exemplified in the questionnaire. While anonymity refers to the identity of individuals, confidentiality refers to the data and information they provide. Anonymity is therefore closely linked to confidentiality. The headteachers were reassured that all the data and information would remain confidential and that no headteacher or school would be named in the report. The question of confidentiality was considered an important one since it may influence how much information a headteacher may give.

Summary.

The methodology used in the study involved qualitative and quantitative methods, which Miles and Huberman (1994) argue makes the process of analysis more systematically explicit and less intuitive. The methods of data collection include:

1. Analysis of OfSTED (1995-1998) reports on primary schools in the selected LEA;
2. Questionnaire to all sixty-nine primary headteachers (Appendix 1);
3. Interviews with ten selected headteachers (Appendix 2), and the senior LEA primary inspector (Appendix 3);
4. Analysis of other documents, including the minutes of an LEA working party of headteachers and inspectors.

Through an analysis of the above data collected within the selected LEA, which is not named to ensure confidentiality, the training needs of headteachers were highlighted. As Spindler (1982) notes:

It is better to have in-depth, accurate knowledge of one setting than superficial and possibly skewed or misleading information about isolated relationships in many settings.

(Spindler, 1982, p.8)

Ethical considerations, particularly related to the use of questionnaires and interviews, are also discussed in this chapter. The following chapter will present and discuss the results of the data from a variety of sources e.g. OfSTED reports, minutes of LEA project meetings, questionnaire and interview data, and availability of courses and support locally.

CHAPTER FOUR.

PRESENTATION AND DISCUSSION OF THE DATA.

General introduction.

This chapter is organised firstly by reviewing the documentary analysis, outlining the results of the leadership and management section of the LEA primary OfSTED reports from 1995-1998. The analysis will inform the contextual background of leadership and management, as demonstrated by primary headteachers who have undergone an OfSTED inspection. The chapter then focuses in on the OfSTED reports 1997-1998, and compares the findings with the national picture of leadership and management (OfSTED, 1998). Next the chapter gives a description of the head teacher respondents and then reports the other types of data.

The first research question examines how the headteachers themselves view headship, through an analysis of the questionnaire data, followed by a more in depth consideration of the interview data. The second research question investigates the perceptions of the training needs of the heads, through a summary of the questionnaire data, and a focused analysis of the interview responses, with some insight gained through the LEA leadership and management steering group, and through an interview with the senior primary inspector.

The third research question targets how these training needs, once identified, may best be met. This question also draws upon data from the questionnaire, which was sent to all primary headteachers, the ten in depth interviews, the LEA leadership and management steering group, and an interview with the senior primary inspector. The fourth research question, asking what the Government is doing to improve the leadership and management of headteachers and will this meet the need of headteachers, was primarily addressed in the literature review section. The findings from the questionnaire and interviews are reported, a summary included in general terms of the results obtained, with the data interpreted and

discussed, including the relationship of the current study to previous research. This data is discussed in relation to the two bodies of literature drawn upon, professional development and school effectiveness and improvement, and the four research questions. Conclusions and recommendations to the LEA are outlined in Chapter Five.

Analysis of the primary school OfSTED Reports 1995-1998 (leadership and management).

An important source of data on research question two ‘What are the CPD needs of primary headteachers?’, was the OfSTED inspection reports. Through the OfSTED inspection framework it is possible to extract from the report to the school, evidence relating to strategic and resource management. In the selected LEA fifty-nine schools were inspected from 1995-1998 and the reports published. Through an analysis of the inspection reports, following Glover, Bennet, Crawford and Levacic (1997), it was possible to further build up a picture of the strengths and areas for development, with regard to headteachers, and strategic and resource management within the LEA. This information can be compared with the headteachers’ own perceptions of what their continuous professional development needs were. It adds to our knowledge of the respondents, giving an LEA wide perspective as to the strategic and resource management currently demonstrated by headteachers in the primary schools which have had an OfSTED inspection.

Before looking more closely at the data, it is necessary to define and explain the levels in Fig. 3 (Analysis of OfSTED reports 1995-1998). Comments in the reports were categorised, assigned levels, and then totalled. Level one comments are those which are classified as critical (poor practice), and they would be characterised as making strong recommendations for changes in future action planning. From the reports comments would be deemed to be level two (neutral) if they were descriptive without praising or condemning a specific feature. Level three (good practice) comments are characterised by positive statements with a,

‘commendatory explanation of processes’ (Glover, Bennet, Crawford and Levacic 1997). The fourth level was included since the reports were not written in a uniform manner i.e. not all of the processes were commented on in all of the reports.

From looking at Fig. 3 which analyses the 59 OfSTED reports from 1995-1998, it is possible to obtain a view of current practice in resource management and the processes of rational planning in the LEA primary schools. What is notable from Fig. 3 is the frequency of ‘no comment’ which would infer that the inspectors are not reporting in a uniform manner, and are therefore not following the guidance set out in the OfSTED framework. However, it is still valuable to note from Fig. 3, which has been constructed through an analysis of the leadership and management, and the efficiency and effectiveness sections of the OfSTED reports, the strengths and areas for development.

In writing the reports the OfSTED inspectors’ comments about what they have seen could be interpreted as subjective, as could the researcher’s through classifying these comments into one of the levels described above. The areas upon which all inspectors reported included the balance and quality of support staff, the adequacy, quality and appropriateness of accommodation and books and equipment.

The areas in which headteachers were said to have demonstrated good practice (level 3) included: the adequacy, quality and appropriateness of the accommodation and books and equipment; the deployment of staff and the balance of quality of support staff; the management of financial control, cost effectiveness and the audit process; and links between the school development plan (SDP) and the budget.

Fig. 3 Analysis of OfSTED reports on 59 primary schools in 1995-1998.

HEADINGS USED IN OFSTED REPORTS	LEVEL 1 CRITICAL	LEVEL 2 NEUTRAL	LEVEL 3 GOOD PRACTICE	LEVEL 4 NO COMMENT
STRATEGIC				
Planning Processes	48%	0%	40%	12%
Governor Involvement	42%	2%	34%	22%
Staff Involvement	14%	2%	36%	36%
PLANNING				
Long term and action	54%	0%	36%	10%
Audit process	18%	0%	68%	14%
SDP presentation	59%	0%	28%	14%
Objective driven	36%	0%	32%	32%
Costing, time	36%	0%	40%	24%
RESPONSIBILITY				
Prioritisation	24%	0%	22%	54%
Key Stage links	14%	0%	4%	82%
Implementation issues	28%	2%	24%	46%
Targets and success criteria	30%	0%	36%	34%
MANAGEMENT				
SDP/budget link	38%	0%	50%	12%
Value for money processes	30%	0%	44%	26%
Value for money assessment	26%	2%	44%	28%
Cost effectiveness	36%	2%	52%	10%
Financial control	14%	2%	82%	2%
RESOURCE ALLOCATION				
Staff involvement	8%	2%	40%	50%
Match to priorities	16%	0%	32%	52%
Evaluation of programmes	18%	0%	2%	80%
STAFF MANAGEMENT				
Deployment	2%	34%	62%	2%
Appraisal	16%	0%	48%	36%
Professional development	52%	4%	40%	4%
Balance/quality of support staff	18%	4%	58%	0%
BOOKS and EQUIPMENT				
Adequacy	16%	2%	82%	0%
Quality and appropriateness	10%	6%	84%	0%
Balance of resources	12%	4%	48%	36%
ACCOMMODATION				
Adequacy	4%	4%	92%	0%
Quality and condition	12%	4%	84%	0%
Balance of resources	6%	10%	56%	28%
EVALUATION				
Monitoring of plans	58%	4%	24%	14%
Role of head/senior staff	32%	4%	14%	50%
Evaluation processes	68%	4%	16%	12%
AVERAGE	28%	3%	43%	25%

In level two deployment of staff received a high figure compared with the other areas. Level one areas identified as critical, were then normally identified as key issues for action. Elements that were identified for inclusion in subsequent action planning covered four major areas that of: firstly, evaluation processes (68%) including the monitoring of plans (58%); secondly, planning both long term (54%) and action planning including the presentation of the school development plan (59%); thirdly, professional development of staff (52%); and fourthly, strategic planning processes (48%) including governor involvement (42%). The training needs highlighted here are evaluation processes, planning, professional development of staff and strategic planning processes.

OfSTED inspections 1997-1998.

In 1997 the Ofsted Inspection Framework was modified, with more clearly defined headings for reporting. A second form of analysis that took place was a detailed analysis of the 18 primary schools that received OfSTED inspections in 1997-1998 with regard to: leadership and management; staffing, accommodation and learning resources; and the efficiency of the school; the strengths and weaknesses can be clearly identified. Of the 18 primary schools which OfSTED inspected in 1997-1998 in the chosen LEA, 8 were infant schools, 6 junior schools and 4 primary schools. With regard to 'The Management and Efficiency of the School', the reports showed that in over half the schools the leadership and management was good or very good. Headteachers and governors in most of the schools provided strong and caring leadership with a clear educational direction. There were 2 schools where the leadership and management was identified as an area of serious weakness. Governors were generally supportive of the work of the schools, although the extent of this involvement varied between the schools. In one third of the schools governors did not have a strategic overview of where the school was heading and were not undertaking an effective monitoring role.

From the reports one could also identify that in approximately a quarter of the schools that the monitoring and evaluation of the pupils' progress, and of the quality of teaching was not undertaken systematically. The role of the subject leader was under developed in approximately a quarter of the schools. Although the majority of schools inspected had identified relevant priorities and targets, and through their school development plan had monitored, reviewed and evaluated progress towards them, nearly a quarter of the schools were identified as having weaknesses in school development planning.

With regard to staffing, accommodation and learning resources the reports acknowledged that these areas were well managed. The numbers, qualifications and experience of staff matched the demands of the curriculum. Generally schools were in good decorative order and were enhanced by attractive and stimulating displays of children's work. In the majority of the schools the quality, range and quantity of learning resources were adequate for the schools' curriculum and the range of pupils. Weaknesses were reported in a third of the schools related to the under use of computers.

In most schools effective use was made of staff, accommodation and learning resources and efficient financial control was established, and educational developments were supported by careful financial planning. Efficient administrative procedures ensured that the schools' day to day organisation ran smoothly. In terms of the educational standards achieved and the quality of education provided, half of the schools provided good value for money, with one school providing very good value for money, and a third of the schools providing sound value for money. Two schools provided unsatisfactory value for money, which was identified in the reports through low standards of achievement, serious weaknesses in the teaching, and weak leadership and management.

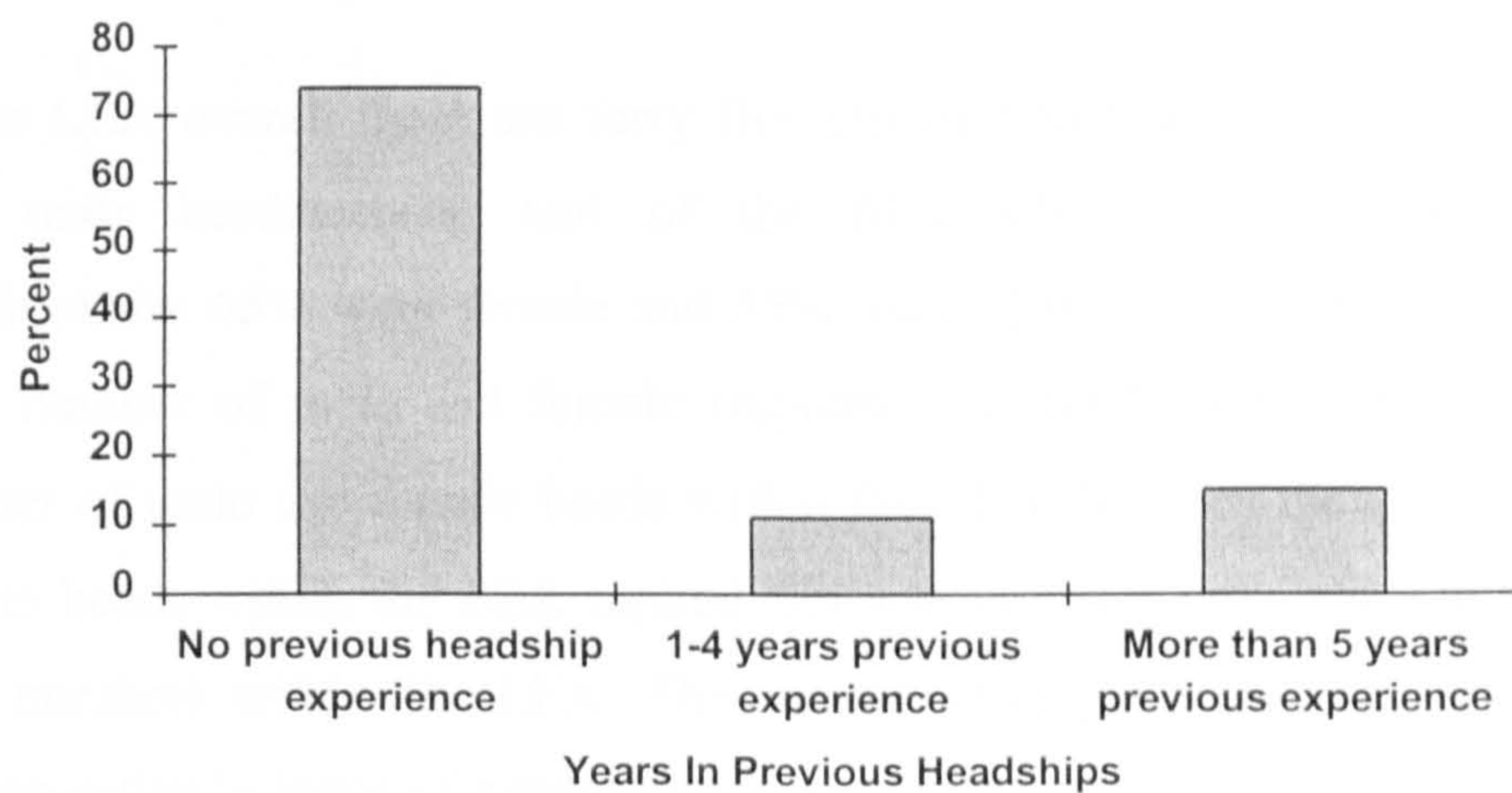
In summary, the Ofsted reports across the years 1995-1998, identified that evaluation processes were underdeveloped, including the monitoring of plans. School development planning, the professional development of staff, and the lack of strategic planning processes including governor involvement were other identified areas of weakness. The focus on the 1997-1998 Ofsted reports showed that there had been some change, with weaknesses identified in school development planning, lack of governors strategic planning and monitoring, lack of monitoring and evaluation of pupil progress and of the quality of teaching, and the underdevelopment of the role of the subject leader. The picture presented from the 1997-1998 reports show a wider range of needs with more explicit areas of weakness. These findings have implications for headteacher training and development, and will be used to further investigate heads CPD needs through a survey by questionnaire and interview.

When reviewing the leadership and management section of the OfSTED reports, which had been carried out in the chosen LEA between 1995-1998, from the data one can conclude that headteachers needed to work upon evaluation processes, including the monitoring of teaching and planning, planning both long and short term including the presentation of the SDP, professional development of staff, and strategic planning processes including governor involvement. Questions here may be asked as to why the governors were not involved sufficiently, and whether this points to a weak relationship between headteachers and the governors. It would appear that planning, monitoring and evaluating, and staff development, were issues that the LEA would want to address with its headteachers through perhaps the formulation of a good quality SDP which would include governor involvement.

Description of the respondents.

From the questionnaire returns (42 returned from 69 issued) and interviews (ten) the headteacher respondents, will be characterised by age, gender, number of years in current headship, and how many years previous headship experience they have. The response rate of returned questionnaires was 61%. The school location, group size, and type of school will be noted, as will the numbers of children on the free schools meals (FSM) and the special educational needs register. Initial and further qualifications of the headteachers will be indicated, as will a consideration

Fig. 4 : Previous Headship Experience



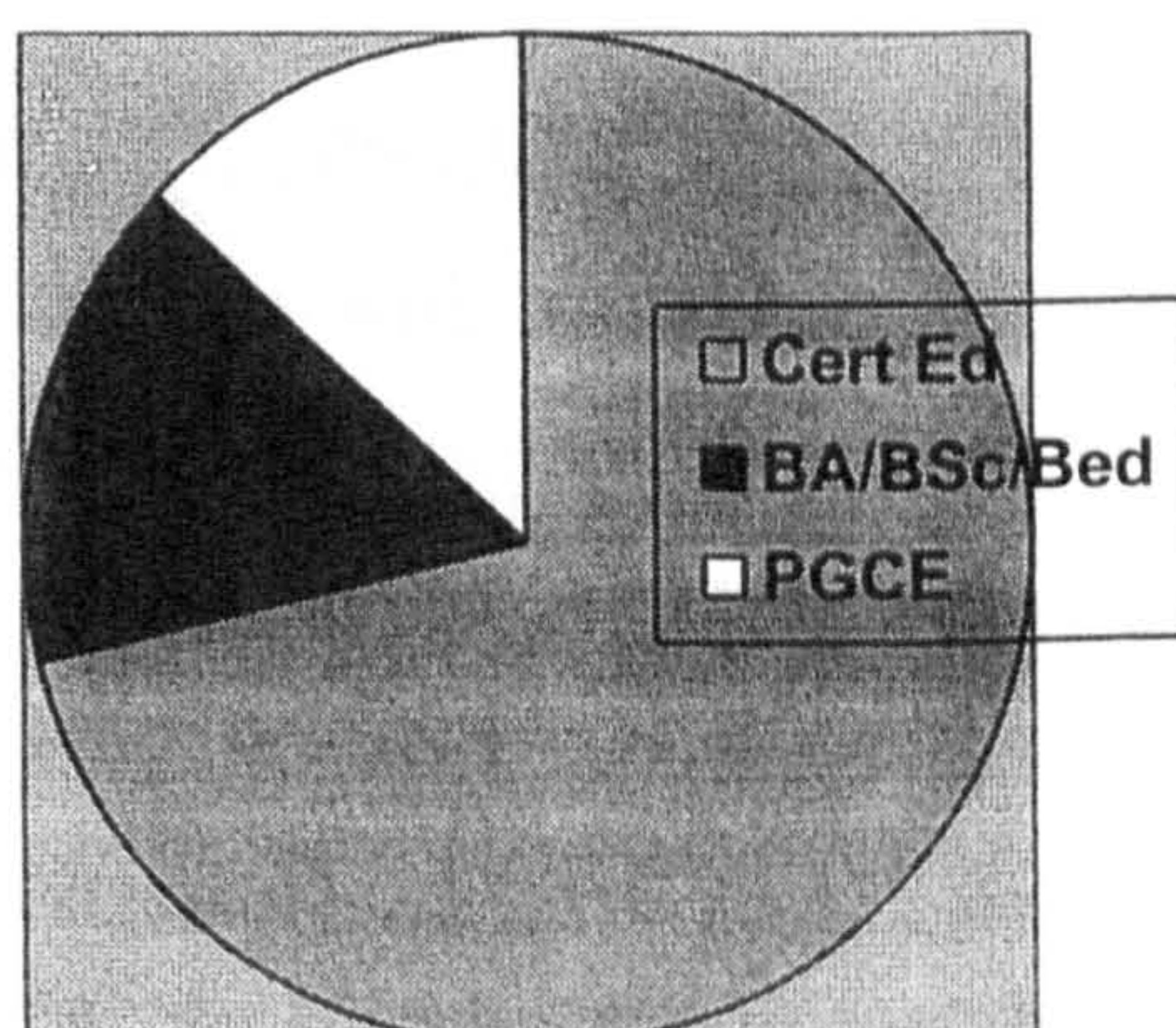
of how they were funded, and the type and timing of training. Where heads received their CPD from, as well as their preferred method of receiving training will be noted. The other more open ended questions on the questionnaire, for example identifying their own training needs, relate directly to one of the key research questions and will be considered in more detail under the appropriate research question heading.

The characteristics of headteachers in the chosen LEA taken from the questionnaire returns show that 50% of the heads were between 40-49 years of age and 50% between 50-65 years old. Of these headteachers: 34% had been in their current headship for less than 5 years; 40% between 5-9 years; and 26% over 10 years. It is interesting to note that, with most of the schools being small/medium that (Fig. 4) 74% of the current

headteachers had no previous headship experience. Headteachers looking for their first headship normally apply for a small school and then in a second headship move to a larger school. Of those headteachers in their second headship, 11% had less than 4 years previous experience, and 15% had more than 5 years previous experience as a headteacher. The location of the schools indicated that 94% of the schools were within the City. There were only 3% of schools that were group 1 in size, with the majority of 80% being group 2, and 17% of schools in the group 3 band. There were, as indicated from the questionnaire returns, fairly even numbers of infant, junior and primary schools. The range of percentage of free school meals varied across the City from 4%-63%.

In the LEA overall there are forty five female headteachers and twenty four male headteachers, and of the 61% who responded to the questionnaire 65% were female and 35% male. This response reflects an even number of male and female responses in equal proportion to the number of male and female heads within the LEA. So even though more female heads within the LEA replied this was in direct proportion to the total numbers within the LEA. The sample of respondents is therefore representative in terms of gender of primary headteachers within the LEA.

Figure 5 : Headteachers initial qualifications



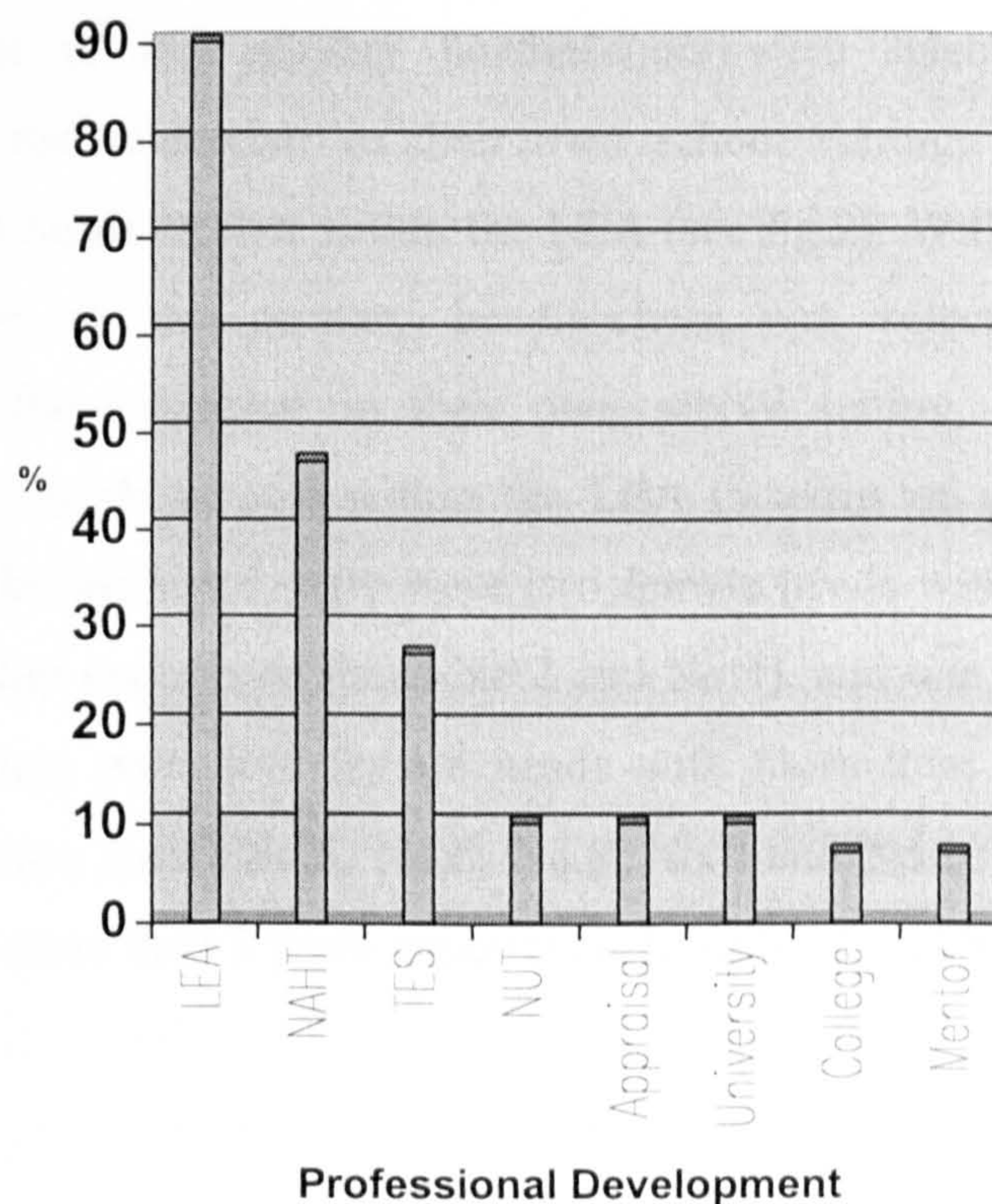
Moving on to initial qualifications (Fig. 5), 71% of the current heads original qualification was a Certificate of Education, with 16% having a

B.Ed, and 13% a PGCE qualification. The take up for further qualifications showed that a high percentage of heads had undergone further training, on a part time basis, with the most common at 44% being a diploma, with 20% of heads taking a B.Ed, and 24% taking an MA/MEd. Other types of training that heads had undertaken included mentor, headteacher link, and OfSTED training. All training 100% was undertaken on a part time basis.

The question relating to funding of headteacher training showed that 72% was allocated from the LEA with 24% of the total funding being self funded, other funding sources included GEST and governors funding. It was interesting to note that headteachers with less than five years experience were more likely to have a degree as an initial qualification, as opposed to colleagues in post more than five years. Male headteachers less than five years in post were twice as likely to have a degree compared with female headteachers who had been in post for less than five years. All headteachers less than five years in post had undertaken a further qualification. This is significant and may be attributed to the expectations of governors who now expect headteachers to have gained higher qualifications. All headteachers had undertaken all training on a part time basis, although within this the training pattern varied between weekend/day/twilight.

The numbers of headteachers currently undertaking training in the LEA worked out to 23% with a quarter of these heads currently on an MA course, and three quarters undertaking NPQH, mentor training, headteacher link training or an EdD. For these courses currently being undertaken as continuing professional development, a quarter of the headteachers were self financing, with the majority of the funding for the remaining heads coming from the LEA, GEST fund or the Governors.

Fig. 6
Source of Headteachers Professional Development



Headteachers' own professional development was obtained from a variety of sources (Fig. 6). Significantly, 90% of the headteachers received their own professional development from the LEA, through briefings, courses, events, and discussions with LEA personnel. Headteachers also stated that CPD was gained from other sources, with 47% from the National Association of Headteachers, and 27% from reading the Times Educational Supplement, with 10% each from National Union of Teachers, appraisal, University, and 7% respectively from a mentor or Higher Education College/Institute. There are differences here about the types of CPD heads engage in since reading the TES is not equal to an individual attending an award bearing course, and the amount of weighting given needs to reflect the differences. The response to the preferred method of receiving training was fairly evenly split, with consultancy on and off site, focusing on school based activities having the greatest number of respondents. Mentoring and an attachment to workplaces inside education received the next highest responses. Little interest was declared in the attachment to workplace outside of education.

A cross section of ten primary headteachers were selected to be interviewed by the researcher in their own school setting, who were representative of heads in post within the LEA (see fig.2). With regard to A cross section of ten primary headteachers was selected to be interviewed by the researcher in their own school setting, who were representative of heads in post within the LEA in terms of gender and experience. Of the ten heads there were two female heads with less than five years headship experience (head No.2 and No.4), and one male head (head No.1). There were five female heads with more than five years headship experience (head No.5, No.6, No.8, No.9 and No.10), and two male heads with more than 5 years experience (head No.3 and No.7).

Of the heads who had been in post for less than five years, head No.1 who had been in teaching for twenty four years, started off teaching secondary, moving into middle school education and then into primary education, was in his first headship. Head No.2, qualified as a teacher in 1971, had been in post as a head for four years, and head No.4 who qualified as a teacher in 1965 taught for a couple of years, and then had a career break for twelve years, being in her current position for a year. Female headteachers who had been in post for more than five years included head No.5 who qualified in 1976 and who had been in her current headship for 10 years. Head No.6 qualified in 1969 and had spent eighteen years in headship, with ten years in her current post. Head No.8, qualified as a teacher in 1966 and had been in her current post for nine years. Head No.9, qualified in 1978 and had five years previous headship experience before taking up her current post three years ago. Head No.10, had qualified in 1971 and had been in post for eleven years. Two male headteachers had been in post for more than 5 years (head No.3 and No.7). Head No.3 trained as a teacher in 1970 had been in post for four and a half years, having had a previous headship for four years, and head No.7 qualified as a teacher in 1969, had spent 10 years in his current post with a previous headship in a first school for seven years. Headteachers

had then had a variety of experiences prior to taking up their current headship, with four of the heads having previous headship experience.

Discussion: characteristics of the primary headteachers in the LEA.

The characteristics of the primary headteachers taken from the questionnaire returns showed that 50% of the heads were between 40-49 years of age and 50% between 50-65 years old. Of all the headteachers, 34% had been in their current headship for less than 5 years, 40% between 5-9 years, and 26% over 10 years. These figures could have implications for the type of support that the LEA would plan to offer schools, with different types of CPD being offered, in the light of recent research evidence which suggests that headteachers are most effective up to 7 years in post. The heads interviewed all stated that they had benefited from teaching in similar types of schools, which supported the finding of Macmillian's 1998 study. Headteacher no. 4 stated that:

Yes I am sure you suit a school, needs can be quite different from an inner city school to a rural school.

It is interesting to note that 74% of the current primary headteachers have no previous headship experience, with 11% of headteachers having less than 4 years previous experience, and 15% with more than 5 years previous experience. This indicates that three quarters of the headteachers were in their first headship, and raises questions as to the relationship with school size (with most of the LEA schools small to medium), as well as support mechanisms available to them and how they view headship. Further research into matching the heads experience to the school context, and whether experience in multiple school settings has an impact on the heads career development would add to our understanding.

There were at the time of the questionnaire 23% of primary headteachers currently undertaking award bearing courses, with 6% of those studying for an MA. The other courses ranged from NPQH, to mentor training. The

funding arrangements varied with 25% of courses being self funded and the rest funded via the LEA, GEST, or governors. It was interesting to note that, very few of the headteachers mentioned HEADLAMP training (although as this is only available in the first two years of headship not many heads in the sample would be eligible) as well as the low numbers undertaking a higher degree. This reflects and confirms the findings in the EMIE, 1997 report, where uptake by headteachers' of accredited courses was very low in some LEAs, and that generally headteachers were reluctant to come out of their schools for more than half a day.

Continuing professional development for Bolam (2000) embraces those education, training and job embedded support activities that teachers and heads engage in following their initial certification. Bolam states that:

Such activities are aimed primarily at adding to their professional knowledge, improving their professional skills and helping them to clarify their professional values so that they can educate their students more effectively.

(Bolam, 2000, p.267)

Professional development here covers a broad range of activities designed to contribute to the learning of teachers and heads. In recent years there have been a number of strategies that have been developed to increase the impact of courses and to encourage a greater variety of approaches to professional development. There has been a broader view of what constitutes professional development and more emphasis on needs identification before the course, and evaluation and follow-up as a result of attending a course (Craft, 1996). Professional development activities can then be differentiated, and for headteachers management development may be thought of as a generic term that embraces the following three broad components: management training; management education and management support (McMahon and Bolam, 1990).

Management training – which refers to short conferences, courses and workshops that emphasize practical information and skills, that do not normally lead to an award or qualification and that may be run by LEAs, schools or by external trainers and consultants from higher education or elsewhere.

Management education – which refers to secondments and to long, external courses that often emphasize theory and research based knowledge, and that lead to higher qualifications.

Management support – which refers to those job embedded arrangements and procedures for, for example selection, promotion and career development, appraisal, on the job coaching, job rotation, job enhancement, retirement, redeployment and equal opportunities, which are the responsibility of the LEA and the school.

(McMahon and Bolam, 1990, p.2)

Although the definition here refers to management development rather than professional development it can be applied to professional development, and enable professional development activities to be differentiated into training, education and support. What was significant from the questionnaire data was that 90% of primary headteachers responded that they kept up to date with developments in primary education from the LEA. 47% of heads received CPD from the National Association of Headteachers (through courses), and 27% kept up to date from reading the Times Educational Supplement, with 10% respectively from the NUT, appraisal, and the University, and 7% respectively from a mentor or Higher Education College/Institute. Although reading the Times Educational Supplement will keep headteachers informed, it will

not provide in depth training. With such a high number of heads looking to the LEA for continuing professional development it is in the LEAs interest to ensure that CPD for headteachers receives a high profile, particularly in the areas (as outlined above) of training and support. Indeed, one could state that this places an obligation upon the LEA to take seriously the CPD of its primary headteachers. This is particularly so in the light of the recent research which highlights the important role of the head in school improvement and school effectiveness (Stoll and Mortimore, 1998, White and Poster, 1997, Ribbins and Burridge, 1994).

How do current primary school headteachers view headship?

From the questionnaire returns overall, views on what it felt like to be a headteacher in the 1990s comments ranged from 'exciting, challenging, but also undervalued by society and the Government', to 'need to keep plates spinning at all times', to 'frustrating, rewarding, anxious', to more negative aspects 'hunted', 'very lonely', 'daunting at times', 'public accountability is now tremendous but public respect is very limited'. An all encompassing view is summed up by one headteacher (questionnaire no 17) who stated that headship for him was:

A great range of feelings from those of excitement at the new challenges being presented by the new Government and LEA, to those of sheer exhaustion at the amount of effort needed to keep the school and staff positive and on track.

The words 'very stressful', 'challenging' 'overload' and 'very lonely' were echoed by the majority of headteachers (92%), but were punctuated with, 'but I wouldn't do anything else', and 'children's reactions and responses make it all worthwhile' to 'there are still times that I feel really proud of the children and indebted to the hard work of the staff'.

All headteachers (100%) with less than five years experience answered this question on the questionnaire fairly superficially with positive and

negative statements e.g. 'exciting, challenging, but very stressful', 'frustrating and rewarding'. From the interviewee responses head No.1 stated that for him headship was about working with people and,

Liasing and tapping into areas of excellence, partnership with the LEA, and it's about being able to listen, it's about being able to respond to the needs of the school.

This headteacher, believed that listening to other people's points of view influenced his own thinking, and that managing this facilitating role was a part of his role as the head. He also strongly believed in his commitment to teach and was regularly time-tabled for three sessions a week to release an NQT for non-contact time. Paperwork for this head happened after 3.30pm when the children went home, but as he stated '...that's hard on the family at home'. For Headteacher No.1, delegation was problematic, and although he acknowledged the need to delegate, he believed that he was in danger of losing a grip on the curriculum because of delegating.

Headteacher No.2's thoughts were firmly fixed on their school amalgamating with a neighbouring school, and that, 'there was enough stress keeping things on an even keel' without additional factors associated with amalgamations. With head No.4 viewing headship as an, 'exciting opportunity to have a go at moving things forward, to actually making a difference to staff and children'. Headship was viewed as working as a team, and the head enjoyed the children and going into classrooms.

Heads with more than five years experience included male heads No.3 and No.7. Head No.3 felt that headship can be a very lonely and difficult role, and that a good relationship with the deputy was critical for him. The headteacher went on to elaborate that headship was a challenging job, and he stated that, 'with all the challenges you are running a school with one arm tied behind your back'. The job was found to be rewarding and what

got him out of bed in the morning was, 'the power and influence to change a school'. Head No.7 found headship not only a challenge but, 'something to get out of I think'. The head felt overwhelmed by trying to get the,

Balance between pro action and re action and doing it all
with the balance of the budget and doing all the other
things thrown at us.

The head also talked about ensuring that the school has a key role still in the community, and is responding to the community, as well as making sure that staff feel well motivated.

Female heads in post for more than five years included head No.5 who believed headship to be a, 'fascinating job' and found it to be 'really challenging'. Most of the time the head enjoyed the role, but stated that there were times where she didn't particularly enjoy it and that, 'there seems to be a few more of them creeping in'. The head tried to analyse why this should be so, with the conclusion being that things such as the literacy hour, were being forced upon the school from outside when the headteacher believed that there were other priorities for her school at that moment in time. The head went on to question the validity of implementing something that was not yet proven against his or her own tried and tested methods which had proved successful in the past. The head begrudged things being forced upon her which she felt was not appropriate for her school at that time.

Head No.6 discussed how the nature of headship had changed significantly over the past six years. Foremost was the decreased involvement in the classroom. She stated that she felt more like a business manager than a headteacher, and that was largely attributable to the amount of paperwork that now crossed her desk. The dilemma for this head was how to prioritise what was important for her, i.e. being

‘involved in what is being done in the classroom’ and managing the paperwork. For head No.8 headship was a,

Huge challenge, frustrating because you never feel that you have done it all, and you never feel that you have finished anything because there is always something else being thrown at you.

Head no.8 went on to say that headship is a job that you sometimes have to react to, and that one cannot always be proactive, but that she still enjoys the job. Head no.9, viewed headship as a multifaceted role, seeing her role as ‘improving educational standards and opportunities for all children’. For this headteacher the role encompassed,

Creating whole persons and so there is a multitude of jobs needed to do that in terms of making sure that personnel management is strong but compassionate.

It was also held of prime importance that parents received the right messages about the values of the school, and that the curriculum was enhancing the children’s opportunities. For head No.10 headship had changed remarkably over the past six years, and she wouldn’t want to take on a headship that was going to cause any great stress e.g. an amalgamation, because there are more things in life than school and it will take an awful lot out of you.

Concerns raised from the questionnaire data included budget issues (36%) and feeling more like a social worker (38%). All heads both male and female with over five years experience of headship answered the question more fully (100%). Their responses were more politically aware, commenting on changes to the education system (82%), greater accountability (79%), more paperwork, and demands from the government and DfEE (84%), and media criticism (36%). Positive and

negative aspects of the job were commented on (100%), 'stressful at times, challenging, but still a job to be proud of', as were thoughts regarding support and looking towards retirement i.e. 'I aim to retire, rather than be retired'. One head summed it up where she stated that she found the job exhilarating but exhausting, and questioned whether she could:

Maintain the pace until retirement, when I see colleagues of my age and experience retiring early on ill health grounds, dying in post, being relieved of their jobs due to failure to manage their schools effectively etc.

It was significant that all female headteachers with five years plus experience commented as their male colleagues, but in addition also commented on how rewarding it is for them when, 'changes bring about improvements for pupils and staff' and that, 'I feel rewarded when I see pupils enjoyment, successes when I see staff develop/improve, and feel that they have achieved' (79%). Female heads over five years also expressed concern for colleagues under greater pressure than they were at present (68%).

There was an overwhelming feeling in the responses (1005) that headship was lonely, challenging, uplifting and invigorating. Heads felt, 'in a river of constant change with little or no time to take a breath or consolidate', with public accountability now tremendous, but with public respect being limited (94%). Pressure from government and LEA initiatives was felt, 'I can usually juggle with all of the balls but someone keeps adding new ones or changing the names of others' (73%). Continuous criticism from the media about schools failing pupils (64%), added to the stress. Indeed headteachers were finding it increasingly difficult to get job satisfaction (75%). Exhausting, but exciting and rewarding characterised how heads felt about their post with tiredness, longer working hours, and feeling overloaded with the expectation of being the leading professional, and

being expected to have expertise in all other management responsibilities (86%).

The final question on the questionnaire asked if there were any other comments. Overwhelmingly heads (87%) both male and female, experienced and inexperienced, responses centred on their relationship with the governors. Headteachers comments, which are discussed below, can be categorised into four specific areas that of, firstly governors (87%), secondly continuous professional development (70%), thirdly legislation (68%), and fourthly changes in the nature of headship over the last eighteen years (38%).

Headteachers discussed how governors are supportive of the efforts of schools and heads (80%), but simply do not have the time to visit regularly and evaluate what is happening, and that it is 'absurd to say that they are responsible for the curriculum' (84%). Other issues related to governors having the power, but rarely having to face the realities of accountability seriously, with some heads (42%) questioning the amount of power that governors have, who 'mostly know little about education'. Heads also commented on the amount of time that they spend in meetings with governors (56%), how difficult it is to appoint governors (62%), and to ensure that they realise their responsibilities (36%). Most headteachers (73%) believed that governors were becoming more pressed to meet the demands of their role, and that few governors have time to regularly come into school during the working day to meet the pupils and staff. Heads (3%) were in the minority who felt well served by their governors,

I have a superb governing body who are immensely supportive. We have built up an excellent professional relationship whereby I am given every opportunity to fulfil my role effectively.

As to the question of legislation, overall heads stated that 'stability' was needed and asked questions as to why they were, 'all beavering away in our corners inventing policies', and it was expressed that, 'keeping abreast of legislation is daunting as it changes so often' (68%). How headship had changed in the past eighteen years was commented upon especially by heads with more than five years experience (64%), and here the main issues were that schools were more, 'focused and systematic in the way they deliver the curriculum', that 'managing the business of the governing body has taken more time', that headteachers, 'delegate far more to senior staff', that 'too many changes have been introduced too quickly', that there is, 'less time and money for teachers to use their creativity' and that,

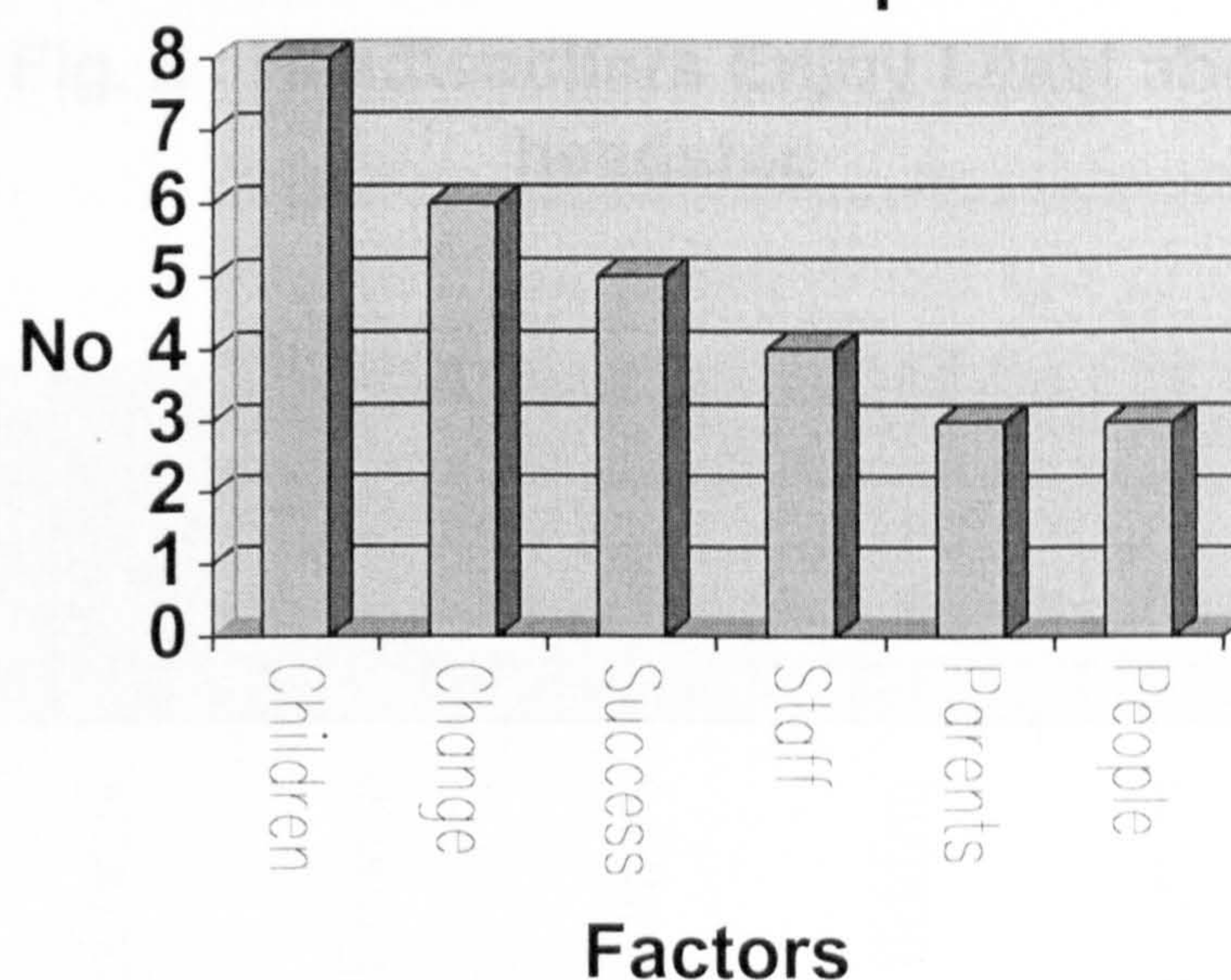
Teacher attendances at courses are restricted to their narrow focus of responsibility rather than the whole spectrum of education.

With the changing nature of the role headteachers (97%) generally reported that it was essential that they were, 'adaptable', 'constantly striving for improvement' remaining, 'positive and encouraging others', and that 'peer group support' and having a, 'network to survive' were essential ingredients in fulfilling the headship role. Several respondents noted that, 'headship is tough' and one headteacher stated,

I would not recommend anyone to go for headship now - the stress is enormous and there is no support to speak of.

What do you enjoy most about your role and what interests you the least?

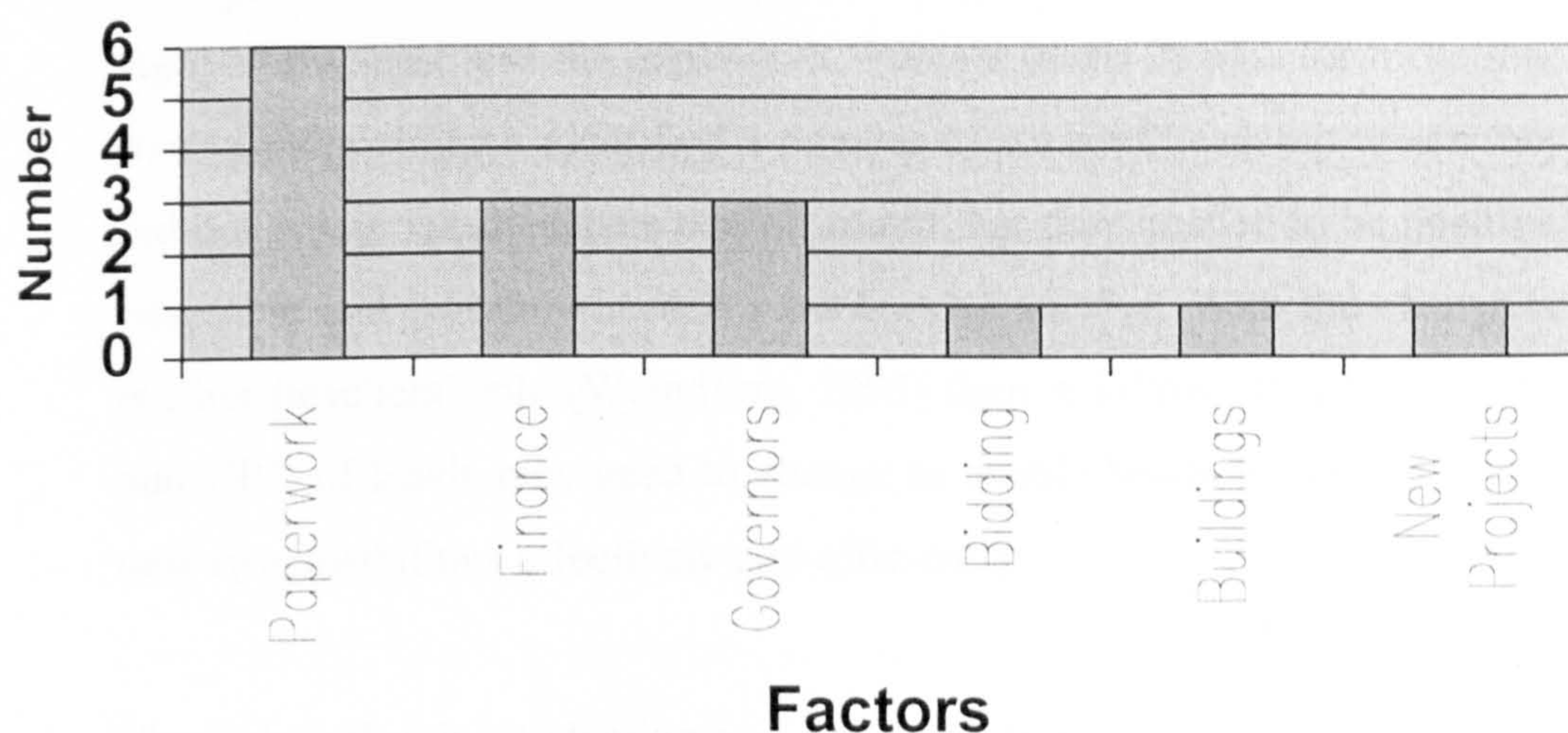
Fig. 7 : What Headteachers Enjoy Most about headship



This question from the interviews threw up some interesting answers (Fig. 7) and foremost as to what heads enjoyed the most, both male and female heads no matter how long they had been in post was, 'being with the children'(8). Overall this was followed by having 'the power to change things' (6), followed by 'celebrating success' (5), watching 'staff flourish' (4), with other factors including 'working with people' both adults and children (3), and receiving positive feedback from parents (3). There was a difference between male and female heads answers to this question with male heads, of varying length of experience in headship, stating that success, children, and staff were the three areas which heads rated as enjoying the most. For female heads the picture presented was different, with those with less than five years experience gaining enjoyment from children, change and success. Female heads longer in post included these three factors and also added people, parents and staff. This shows that female heads in post for more than five years tend to have a wider range

of factors that they considered when thinking about their role and what they enjoyed than their male and female colleagues, with less than five years experience, who had a much narrower view. What overall interested headteachers the least about their role (Fig. 8) was ‘the paperwork’ (6),

Fig. 8 : Headteachers Enjoy Least about headship



followed by ‘finance’ (3). Governors provoked some strong reactions for example, ‘I hate governors’. What headteachers found frustrating was that meetings with governors were very time consuming, and they often felt that they were going through the motions of making them participants in decision making about school issues (3). Other areas that heads disliked about their current role was that of the ‘bidding culture’ (1) which was also felt to be time consuming, ‘building management’ (1), and the starting of new projects where conflict was likely to arise (1). What was noteworthy here was the male headteachers no matter their length of experience in headship only noted paperwork, as did the female heads with less than five years experience. It was the female heads with more than five years experience who had a wider range of activities that they enjoyed the least.

In summary, from the questionnaire data, primary headteachers found the role 'challenging' and 'stressful', with constant changes which made it more difficult to get job satisfaction. Heads with more than five years experience of headship responses were more politically aware, commenting on changes to the education system, greater accountability, more demands from the government and DfEE, and media criticism. From the interview data female heads in post for more than five years enjoyed a wider range of headship activities than their less experienced female colleagues or their male counterparts. The part of the job that male heads enjoyed the least was the paperwork. Female heads in post for more than five years in contrast identified a number of areas of headship which they did not enjoy. Headteachers overall found that they needed to be positive, adaptable and that they needed a network to survive. With the change in the headteachers' role (Weindling, 1995) then it follows that the training and CPD of heads may need to change to enable heads to carry out their new responsibilities effectively and efficiently.

The link with job satisfaction and perceived training need is an important one (Mercer, 1995). Here the value of the headteacher is directly related to the heads self-perception, relationships and a sense of efficiency. Indeed, an objective of the establishment of the National Leadership College is to contribute to enhancing the status of the headteacher and the training and development of the school leader (Blair, 1998). There are other contextual factors, which may impinge on the job, and these too should be taken into consideration e.g. personal or organisational.

Primary headteachers' comments about the role of headship, and the rate of change, from the interview data, confirm the research findings (Weindling, 1995) that the nature of headship has changed. From Bolman and Deal (1992) and Hsieh and Shen's (1998) studies, and the above data, it would suggest that school leaders need to be better prepared in the political and symbolic aspects of their work. This is particularly important when change is an ever-present feature of the education system. Further

research into the type of power that headteachers were eluding to would have proved an interesting avenue to pursue, and that headteachers are aware of the different power bases is an important consideration for CPD. Johnson and Short's (1998) research showed that school leaders need to refine those leadership qualities that develop and foster interpersonal relations, and that heads should be prepared to operate from personal power bases rather than from position power bases.

What are the primary headteachers perceptions of their training needs?

From an analysis of the Ofsted reports 1997–1998 we have already seen that there had been some change, from the 1995 reports, with weaknesses identified in school development planning, lack of governors strategic planning and monitoring, lack of monitoring and evaluation of pupil progress and of the quality of teaching, and the underdevelopment of the role of the subject leader. Following through on the questionnaire (question 25) heads were asked (in relation to the 'National Standards for headteachers' 1998) to identify their current professional development needs. Overall headteachers were most confident in the areas of: leadership (23% identified no need of training), accountability to governors, pupils and parents (27% identified no need of training); and in determining the strategic direction of the school (21% identified no need of training). The areas heads identified as the greatest need of training was in: monitoring and evaluating progress (12% identified a great need and 45% identified moderate training need); management of improvement of pupil achievement (21% identified a great need and 48% identified moderate training need); and the management and performance of staff (12% identified a great need and 58% identified moderate training need) (Fig.9).

It was interesting to note that there was an identifiable pattern between male and female heads' needs and a correlation between heads male or female, who had been in post for more than or less than five years. Male

heads, no matter how many years in headship were most confident in leadership (71%), strategic direction (75%), monitoring and evaluating progress, and accountability to governors (76%). They perceived that their greatest needs of professional development were in management and performance of staff (84%), and management of improvement in pupil achievement (80%). Female heads identified that they too were confident in leadership (80%) and accountability to governors and parents (79%), and that their greatest needs were in four areas. These areas are: strategic direction (82%); management and performance of staff (80%); management of improvement in pupil achievement (84%); and monitoring and evaluation of progress (84%). Female heads had then identified a wider range of needs than their male colleagues.

Male headteachers in post for less than five years identified that they had possible training needs in all of the six areas highlighted in the national standards, and not one male head identified that he had no training needs in any of the six areas (management and performance of staff, management of improvement in pupil achievement, management and evaluation of progress, strategic direction, leadership, and accountability to governors, pupils and parents) They had great need of training in management and performance of staff (68%) and in management of improvement in pupil achievement (68%). This is in contrast with the female heads with less than five years experience of headship, whose answers ranged from no needs and no great needs in all areas, to moderate needs in four of the six areas. The areas of training of moderate needs identified included the two that the male heads had acknowledged (management and performance of staff (66%), and management of improvement of pupil achievement (66%)), and on top of these management and evaluation of progress (68%), and that of strategic direction (50%). The female heads in post for less than five years were either more confident than their male colleagues or identified a high proportion of moderate need in the four areas. Their male colleagues had a higher percentage of possible needs with a wider range of moderate to

great needs in management and performance of staff, and management and improvement in pupil achievement.

Female and male headteachers with more than five years experience both showed a wider spread of needs from no needs to great needs which contrasts with their colleagues who have less experience of headship, where the percentage of heads with no training needs in any of the six areas was very low. In the case of the female heads no great training needs in any of the six areas were identified. The pattern mirrored the gender differences of their less experienced colleagues with male heads having a narrower range of training needs centred on management and performance of staff, and management of improvement of pupil achievement. The female heads identified these two areas, and two more, that of management and evaluation of progress, and that of strategic direction.

From Fig. 9 it can be determined that the heads perception of their own training needs are less in the areas of leadership, accountability to governors, pupils and parents, and in determining the strategic direction of the school. It can be clearly identified that the training need peaks at possible need, with a downward trend to moderate and to great need, thereby indicating that these three areas are the ones, which the headteachers feel most able to manage. This is not the case with monitoring and evaluation of progress, management of improvement of pupil achievement, and the management and performance of staff, where there is an upwards trend, with heads therefore being less confident, whereby the trend, from no to possible, and then to moderate needs, indicates that they are in greater need of training in these areas.

Question 27 on the questionnaire asked the heads to identify their specific training needs (Fig.10). The range and scope of answers to this question reflects the nature of the job and the current heads experience and interest, depending on the particular context in which they find themselves working. Monitoring and evaluating progress was the highest ranked response with 'target setting', and help in the 'interpretation of statistics' as well as, 'critical skills to be able to monitor the quality of teaching' being important professional development needs. The next priority was management and performance of staff, with 'motivation', 'how to develop underachieving staff' and 'management of teacher performance and how to improve it', prime considerations. Thirdly, leadership with 'clear guidance as to how to manage the complex, overwhelming demands as a primary head' was identified. Next, the management and improvement of pupil achievement with headteachers wanting training on 'effective ways of consistently raising standards from a low pupil attainment threshold'. Fourth was the identification of need related to the strategic direction of the school, which was also linked with how to ensure wider governor involvement (48%) and linked to the school development plan (SDP) (36%). Lastly 'updating ICT skills' (18%), 'monitoring tasks by middle management' (15%), 'financial management'(15%), as well as how to make the 'SDP more effective, understood, comprehensive etc (6%).' were also identified as training needs by a minority of heads. One headteacher noted that what she needed was 'regular individual support to discuss observations of my work in monitoring and supporting my staff'. One national requirement was identified by heads as a training need, that of, 'implementing literacy/numeracy strategies in line with national requirements' (16%).

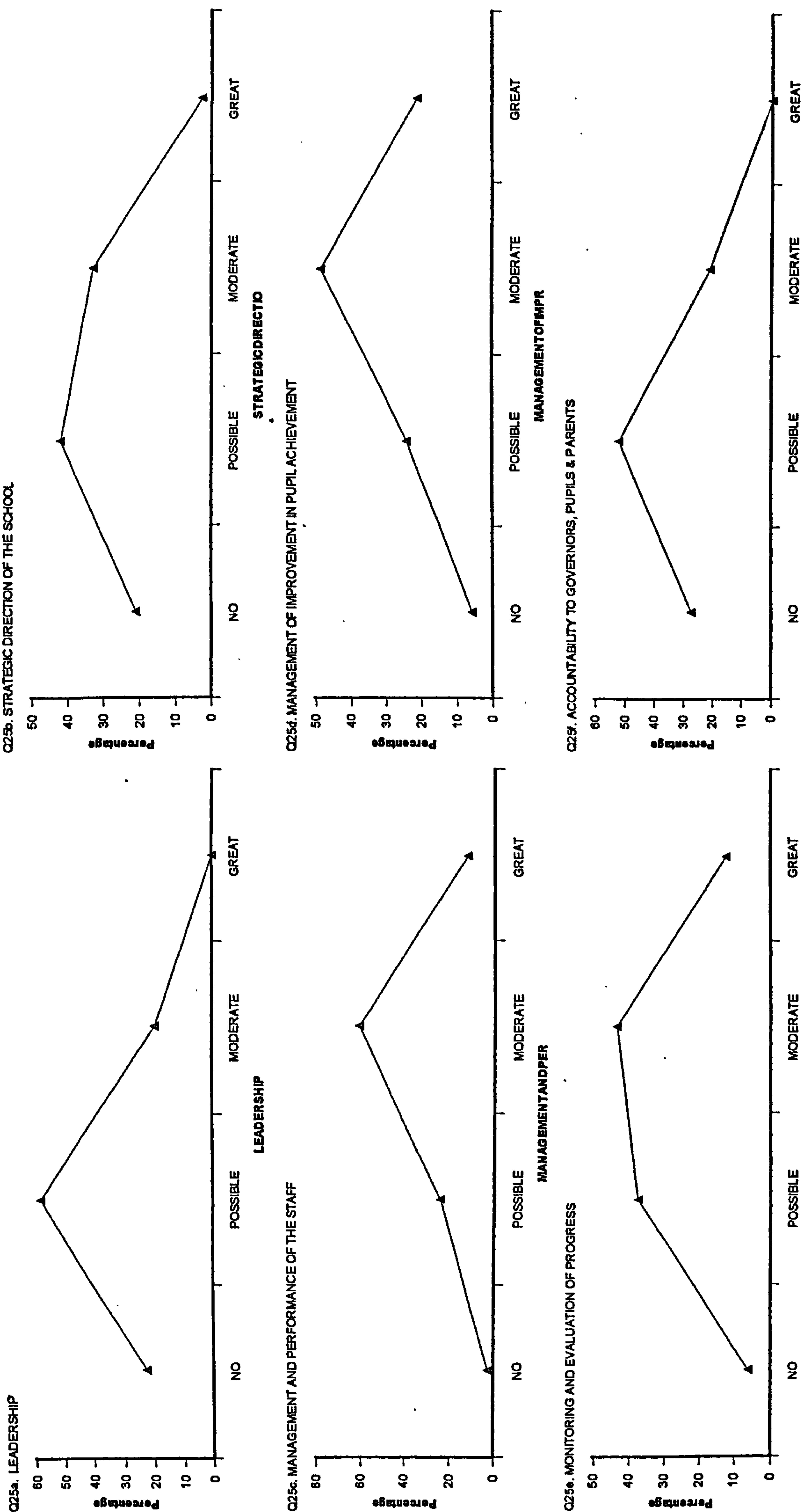
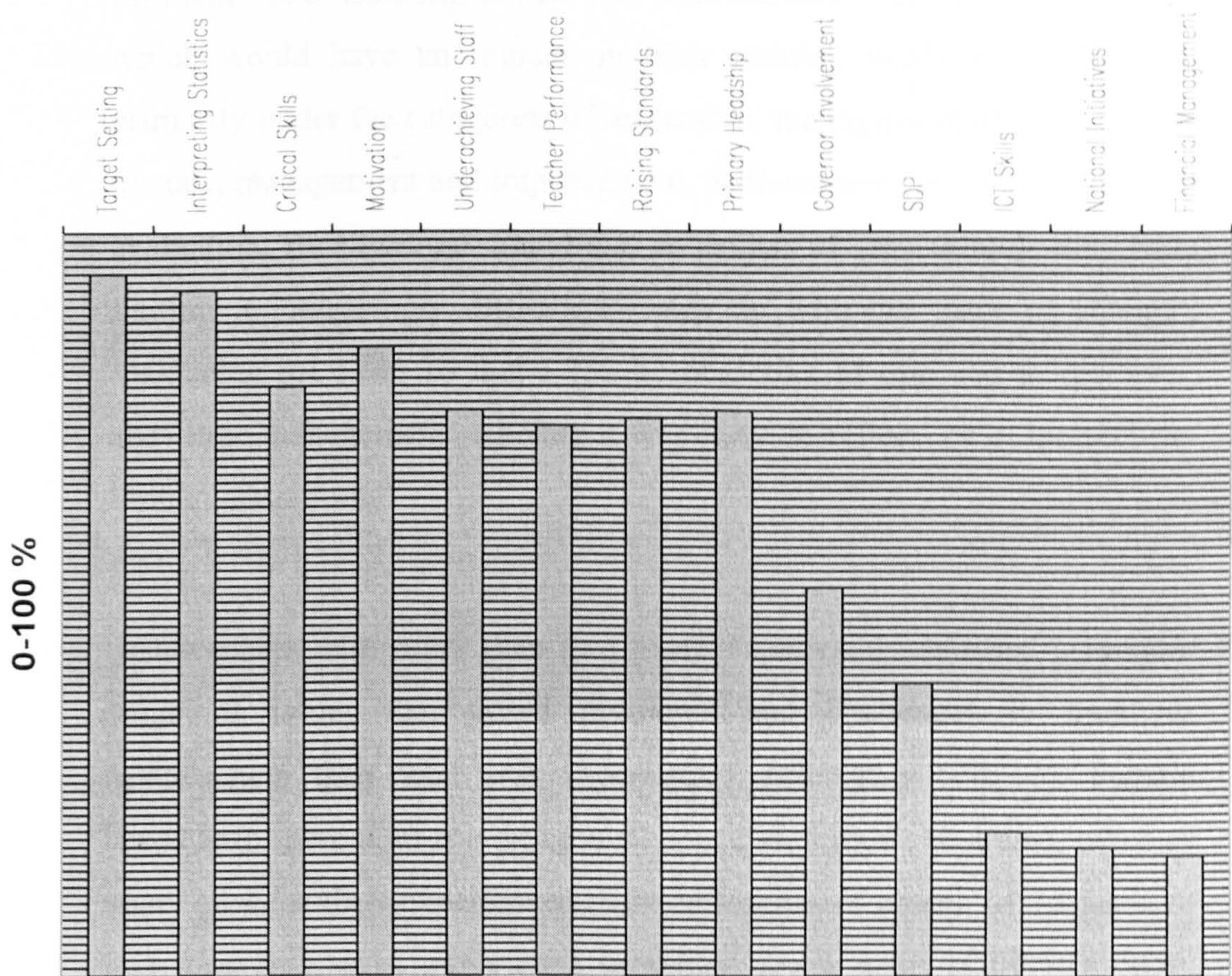


Figure 9: HEADTEACHERS TRAINING NEEDS IN RELATION TO THE NATIONAL STANDARDS

Fig. 10 : Questionnaire Data - Headteachers Training Needs



Question 28 on the questionnaire asked headteachers to note any specific training needs identified from an OfSTED inspection. The majority of headteachers (87%) left this section blank. Some issues however were identified (from a total of six heads), with the management and performance of staff identified as a training need with specific reference to ‘monitoring the quality of teaching’ (3) and to ‘raise the levels of middle management’ (2). Monitoring and evaluation of progress was also identified by the OfSTED inspectors, and here the emphasis was upon the need to ‘develop a sharper focus for the SDP’ and the issue of addressing ‘continuity and progression’ (4). A national requirement to ‘ensure cost effectiveness’ (3) and to ‘improve spirituality via assemblies’ (2) was also

featured in the OfSTED reports to schools within the LEA and identified by headteachers as specifically relating to them.

Problems and challenges that the headteachers were currently facing which would have an impact on their training needs were identified primarily under the categories of leadership, management of performance of staff, management and improvement, achievement, and monitoring and evaluation. Headteachers found that as leaders of their schools they were finding it increasingly difficult to keep up with the 'pace of change', 'balancing priorities so that I can be proactive as opposed to reactive', and 'time management' whether it was 'time to reflect' or to 'protect my time in classrooms'.

Headteachers with more than five years experience identified a broader range of issues that posed problems and challenges to them as headteachers than their less experienced colleagues (Fig.11). Female heads with more than five years experience identified (10 areas), twice as many areas as their experienced male colleagues (4 areas). Male heads of less than five years experience presented fewer areas (OfSTED, SDP, staffing, parents, pupil behaviour) than their female colleagues of less than five years experience (staff management, introduction of national initiatives, pace of change, time management, raising expectations of pupil behaviour, rising/falling rolls, and governors). Female headteachers with more or less than five years experience both noted leading and managing staff, time management, and pace of change which male colleagues did not indicate in their responses.

What was interesting to note was that half of the headteachers interviewed did not identify a training need, but rather discussed issues related to the value of training, which is typified by head no.1 who said that, 'training is really vitally important'. Needs that were identified did not show any gender differences and included 'ICT' (4), 'literacy/numeracy project' (2)

and one each respectively to ‘time management’, ‘staff development’ and ‘monitoring’. Issues discussed relating to training needs highlighted the

Figure 11: Problems and Challenges That Primary Heads Face

Problems/Challenges	Male Heads Less than 5 Years	Male Heads More than 5 Years	Female Heads Less than 5 Years	Female Heads More than 5 Years
OfSTED	X			
SDP	X			
Staffing	X	X		
Parents	X			
Pupil Behaviour	X		X	X
Pupil Progress		X		X
National Initiatives		X	X	X
Raising Expectations		X	X	X
Staff Management			X	X
Time Management			X	X
Governors			X	X
Finance			X	X
Pace of Change			X	X
Rising/falling Roll			X	X

need and importance of training, ‘needing a challenge’, and that ‘time to reflect away from school’ was crucial. Headteachers answers included ‘putting others first’ and ‘forgetting your own training needs’ were typical responses. Conflict was apparent from the answers between the need for training, full time commitment to the school, and the quality of family life and is summed up by one headteacher’s dilemma,

I can't make the job last if I don't keep putting in, but I can't keep my family properly if I don't input, so I've got to get that balance and time is the crucial factor

(Headteacher, No.5.)

Guilt and embarrassment was apparent where headteachers had not undertaken further studies but as heads pointed out, 'I met three evenings this week and worked all weekend', and 'I do not want my life to go by where everything has been school orientated'. One off courses were thought to be valuable but did not always give the heads enough challenge, and that was a reason given by a head who was undergoing further sustained continuing professional development (Headteacher, No.9).

In summary, from Fig.12 it can be determined that heads training needs can be ranked by the number of times indicated by sources of data (from analysis of the OfSTED reports, from questionnaire or interview data with the primary heads, from the LEA leadership and management steering group, or from an interview with the LEA senior primary inspector) with management and evaluation of pupil progress ranked no.1 being nominated four times. There was then a match between needs identified by heads and those highlighted in the OfSTED reports. Ranked second were the three areas of strategic planning and monitoring, evaluation processes, and CPD for heads and staff, with three nominations each. Ranked third was SDP, monitoring the quality of teaching, management and performance of staff, management of improvement of pupil achievement and ICT, with two nominations each. Ranked fourth with one source of data was management of change, behaviour management, Literacy/numeracy strategy, leadership, development of subject leaders and time management.

How might headteachers training needs best be met?

Through an analysis of the questionnaire data, it has previously been determined that 100% of the current award and non award bearing courses that heads undertake is on a part-time basis. 23% of headteachers are undertaking part time study, including MA courses, diplomas, mentor training, and headteacher link training. The most popular forms of provision of training, were evenly split between consultancy both on and off site. Consultancy was viewed as working with a professional consultant on a school project, and was viewed by heads as training on the job. Mentoring and attachment to the workplace inside education received the next highest response. Little interest was expressed in the attachment to workplace outside of education.

Many headteachers discussed issues relating to qualifications and training in the final question on the questionnaire, which asked a simple open question as to whether the head had any other comments that they wished to make. The first comment 'all headteachers need a mentor' is a strong statement recommending mentorship (32%). There were many comments relating to training (67%), ranging from how providers 'get to where they are?' to 'I think it is appalling that professionals put up with second rate locations and food compared to business', to 'there can be a credibility gap between providers and those working in schools', and that there is plenty of training, 'but little support for putting it into practice in the workplace'. Heads (77%) found it helpful to have 'peer group support' and 'a network to survive' with one head stating 'I value the small network of colleagues I can support and be supported by'. The LEA was 'becoming more supportive, but also more challenging in setting targets to achieve'.

Primary heads training needs	RANK ORDER	Ofsted reports 1995/1998	Ofsted reports 1997/1998	Questionnaire data – training needs in relation to the national standards	Questionnaire data – heads specific training needs	Interview Data – heads own training needs	LEA – heads training needs	Leadership management steering group – heads training needs
Management & evaluation of pupil progress	1		+	+	+		+	
Strategic planning and monitoring	2	+	+		+			
Evaluation process	2	+					+	+
CPD – heads & staff	2	+				+		+
SDP	3		+		+			
Monitoring quality of teaching	3		+			+		
Management & performance of staff	3			+	+			
Management of improvement of pupil achievement	3			+	+			
ICT	3				+	+		
Management of change	4							+
Behaviour management	4						+	
Literacy/numeracy strategy	4					+		
Leadership	4				+			
Development of subject leaders	4		+					
Time management	4					+		

Figure 12: Comparison (from data sources) of identified training needs of primary heads within the LEA

Other comments relate to being a new head, 'I would have appreciated a mentor and a handbook of practical guidance on the basic paperwork requirements' (18%). Training courses 'about new national initiatives have kept me informed and able to respond well in my own school with my subject co-ordinators' (12%). HEADLAMP (8%) was seen to be, 'a disappointment - most courses were not relevant to my needs', with NPQH (10%) being seen as competency based and 'certainly sharpens the focus' with it being 'work based rather than in addition to, but the weekend training sessions can be burdensome'. One headteacher thought that secondment would be the most efficient way of headship training.

Does the current continuing professional development provision locally meet the needs of headteachers?

With the new Unitary Authority coming into force in April 1997 the LEA had to set up new mechanisms, and set programmes into place. The reaction of the majority of headteachers to the current provision of continuing professional development (training and support) within the LEA from the interviews was very positive. This view is characterised by the following statements. Headteacher No.3 stated that, 'I have every confidence in what they are trying to do and obviously it's clear that we are going to work together', and headteacher No.5 who believed that the LEA did now meet headteachers needs and that, 'it is the New Unitary Authority that has made the difference, it's been a remarkable difference and I've been very impressed'.

The continuing professional development available within the LEA, which was commended by the headteachers, included,

The LEA do an annual get together of headteachers which is looking to our future and the LEA sharing the future with us, the strategic planners take us with them so that is good.

(Headteacher, No.6)

Other welcome initiatives from the new LEA itemised by the heads included: good support from the link inspector; a two day off site conference for heads, deputy heads, and inspectors; heads conference focused on management; head and deputy head clusters where shared issues are discussed; and a community newsletter. Headteacher No.3 believed that, 'The LEA is on the right lines. Certainly they are aware of what needs to be done, whether they have got the resources to do it I don't know'. For head No.4 having access to Headlamp money for training had been significant,

I felt there were things that I needed to do and I had the money behind me, and I didn't feel that I was taking it (the money) from any other member of staff.

Headteacher No.1 in response to the question (as above) would like to, 'have a mentor so that one can talk about real issues where we can learn from each other'. As a catholic, headteacher No.6 was critical of the Catholic regional management courses in so far as they covered vast areas, 'being unrealistic with time management', it was not therefore always practical to attend. There was a head and deputy headteachers conference organised for the catholic sector which explored management issues, as well as a planning group looking at current issues and forwards to the millennium, including support mechanisms.

Headteacher No.9 was entirely negative in her response stating clearly that she did not think that the CPD needs of headteachers were being met saying that,

This may sound a bit harsh, but I don't feel that I've had any useful training as a head coming from the LEA since I've been a head.

The headteacher went on to explain that regular briefings had taken place but that this was different from training. The head felt that individual needs were not being met saying that,

It has gone very much on to what are the needs of the institution, and as a head I have to play the game but nevertheless... There is a need to be a learner yourself. If you are a learner yourself you can structure people's learning rather more effectively.

In summary headteachers views were generally very positive towards the LEA who had started to address institutional and partnership needs and issues, but recognised that resourcing may be problematic for the LEA. Individual CPD needs of headteachers were not always being met by the local provision.

What kind of support do you receive and from whom?

The overwhelming majority of headteachers (100%) received support from the LEA through the Link Inspector, Education Officer, Director of Education and the Chief Inspector.

I liked the link inspector idea. It's beginning to become effective, and I see it as a partnership and I think it is important. You have got someone who is a professional friend that you feel you respect and they've got credibility, and as a critical friend.

(Headteacher, No.8.)

Governors were felt to be supportive by 70% of headteachers, 'governors do their best - they all have their own levels' (Headteacher, No.10.). Other headteachers and staff were found to be supportive by 40% of headteachers, with 30% naming their deputy head, 20% their partner and

the school parents association, and 10% respectively for the school administration officer and a mentor. One headteacher stated,

It's a very lonely job being a head and recently we have seen within our own cluster of catholic schools two colleague heads go through a lot of anxiety and pressures. Both have left their headship either temporarily or permanently and there should have been a mechanism there to support them and it isn't there. No one was there for headteachers from the diocese.

(Headteacher, No.6.)

Headteachers who had been in post for more than five years were more likely to include staff and governors in answer to this question, with female heads in post for more than five years more likely to include other headteachers, with more recently appointed heads stating that they received support from a mentor. Gender and time in headship was therefore a factor in where headteachers found support.

In summary, the headteachers views as to how training needs may best be met included that training be part time, with the most popular form of training being consultancy either on or off the school site. There was also support for mentoring and attachment to the workplace. CPD locally reflected working in partnership, with headteachers receiving strong support from the LEA. Governors, and other heads and staff were also found to be supportive. There was a difference noted between male and female heads and length of time in post as to how they were supported.

The extent to which the provision of CPD matches the needs of the primary headteachers (Interview data from the senior primary inspector and perspectives from the LEA Leadership and Management Steering Group)

The LEA has consulted widely on its Strategic Education Plan, and all activities relating to the CPD needs of headteachers are identified in the plan. The plan reflects the needs of primary headteachers, and is a summary both of the schools perspectives and needs, and of the information generated from an analysis of the termly Self Supported Evaluation visits, OfSTED reports, and the management and partnership groups (EQS, 1999). The LEA sees its role in CPD for headteachers as supporting school improvement, developing strategies within schools, challenging schools, target setting, and supporting schools to become reflective, and self evaluative. Limitations to support primary headteachers in their CPD are identified as a lack of funding to support various initiatives.

The current Government initiatives to raise standards of leadership and management are actively supported by the LEA, despite the fact that current mechanisms circumvent the LEA. For example, the NPQH and LPSH are viewed positively by the LEA as good quality courses, with feedback. The LEA is working towards the position whereby the headteachers identify their own needs, and see a clear pathway through the National Standards, being proactive in their own CPD. The LEA is developing an agenda for CPD for heads, which is informed by the literature on effective leadership. The data from the headteachers through the questionnaire data indicates that they do have training needs in relation to the national standards as identified in Fig. 9.

The LEA perception of primary headteachers' needs is then based on a range of data from a variety of sources. The needs of primary heads range from target setting, management and evaluation, to developing evaluative skills within monitoring, to developing an effective behaviour

management policy. Most schools in the unitary authority have a coherent CPD programme within the school. The quality of leadership and management is perceived to be sound overall with wide variation from good to unsatisfactory. Currently the LEA is offering a number of courses including the self supported evaluation visits to primary headteachers once a term, the NPQH, a leadership and management course, a management conference, and a residential planning, evaluation and problem solving course. The LEA devolves 70% of its standards budget to schools for school improvement (1999-2000).

Continuing professional development opportunities with the chosen LEA are closely focused around the priorities of the Strategic Education Plan (SEP) and the School Improvement Plan (SIP). There are five key themes arising from the two plans: raising standards; improving the quality of provision; working together; equality, entitlement and inclusion; and lifelong learning. Opportunities for continuing professional development with the unitary authority are limited for a number of reasons. Firstly the LEA is still establishing its infrastructure, and it does not currently have a dedicated LEA CPD officer. Secondly the LEA does not have the resources to provide for a comprehensive continuing professional development programme, and thirdly there is neighbouring complementary provision from other providers.

The LEA is currently promoting that not only should every school have a staff development policy and plan but that every member of staff should have their own learning plan. Headteachers would then have more direct influence, responsibility, and impact on CPD for their staff and themselves, with a more systematic approach to CPD. If the LEA is recommending a planned co-ordinated programme to CPD within its schools, it will need to ensure that Education Quality Services can offer and provide the necessary support for schools. It would appear necessary to appoint a co-ordinator for CPD to ensure that a quality, structured, systematic approach is established, ensuring an improved system for the

administration of CPD within the LEA. CPD within the LEA would also need to consider the phase of teaching which the individual is currently in whether that is the induction, developmental or transition stage, as well as establishing a framework for career progression. There is a difference to what the LEA says it is currently promoting, and how that is translated in practice.

Headteachers across the city should, it was felt by the Leadership and Management Steering Group, have a shared perception of where the schools in the new Unitary Authority have come from, and where they need to get to. The headteacher was seen to be the key to the success of schools and that they would need effective support to develop skills in understanding and using the increasing amount of performance data and benchmark material. The key word was 'sharing' which was reaffirmed by the whole group. Sharing was seen as a way of raising the professional confidence of headteachers.

The steering group identified a number of key issues for CPD of headteachers, which included that of the importance of a support networks for heads both formal and informal, and that this needed to be an essential element in any training programme for headteachers. Areas for development were: appraisal; mentoring for new and existing headteachers; career advice; continuation of good practices e.g. induction, link days, link inspector's termly visits, and informal/formal networking. The management of change was identified as a focus for CPD, as was the process of prioritising and the need for a critical friend. It is interesting to note here the gap between what this group identified as training needs and what the headteachers themselves identified. This may be attributable to the group of heads identifying functions and processes that the LEA could be engaging in with headteachers, as opposed to individual heads identifying their own personal training needs.

Generally the responses to the question by heads when being interviewed about the availability of CPD locally, met with very positive responses from the primary headteachers. Working together with the new unitary authority was seen as a priority. Good support was received from the link inspector, and the head/deputy head cluster groups and panels. A need was perceived for the headteacher to be seen as a learner. The headteachers two day off site conference was seen as important, as was the one day conference which focused on management. The community newspaper and access to HEADLAMP money were also seen in a positive light by the heads.

A minority feeling was expressed that institutional needs as opposed to individual needs were being met through the LEA, and that briefings as opposed to training had taken place. Catholic regional management courses were criticised for being unrealistic due to their location which were often at some distance from the LEA location. It was perceived that the catholic headteachers were not as well supported as they would like to be by the diocese. Primary headteachers would like to have a mentor.

It was significant that all of the ten primary headteachers, from the interview data, received support from the new Unitary Authority, from the school's link inspector, Education Officer, Chief Inspector, and or Director of Education. Governors were felt to be supportive by seven out of ten heads. Other headteachers and staff were identified as being supportive for four out of ten heads. Deputy head teachers were singled out by three out of the ten heads, with two heads finding support respectively from the school's PTA, and from partners. One headteacher received support respectively from the school's administration officer and from a mentor. Lack of support from the catholic diocese was noted. High quality relationships had been established within a short time frame between the new Unitary Authority and its headteachers, and it is significant that this had been given a high priority.

One can conclude from the data which has come from an independent source (OfSTED) as well as from the headteachers own perceptions of their training needs, that priorities identified by the heads echoed those comments in the OfSTED reports and were ranked in the first three in Fig.10. Areas for training ranked fourth in Fig.10 largely came from the interview and questionnaire data and were specific to perceived individual needs. That headteachers were not confident at monitoring and evaluating progress, or of managing the improvement of pupil achievement, would indicate that the LEA should as a matter of priority focus upon this area if it is to achieve its objective of raising standards. Questions may be asked as to the relationship between the schools and their governing bodies as governor involvement was stated as weak. Further questions may be asked of the relationship between the former LEA and the schools and the governing body, and what training the governors have had access to previously, and whether they have undertaken any training. Questions need to be asked of the new Unitary Authority as to how they propose to help their schools to address the issue of governor involvement across the city.

From an analysis of the interview data it was interesting to note that 50% of the headteachers did not identify a training need. The headteachers acknowledged that training was important, but they did not see it as a priority for themselves. These findings mirror the EMIE (1996) survey which revealed that headteachers considered their own training needs last. The lack of time for training was identified as a significant factor for lack of training, with short courses seen as valuable, but a need was recognised for headteachers to participate in longer courses where more sustained CPD could take place. Needs that were identified related to further training for the implementation of literacy and numeracy strategy, ICT, staff development, time management, and monitoring.

It appeared that headteachers felt almost deskilled by the introduction of the literacy and numeracy strategies, since they were not involved in the

activities on a daily basis, and had no direct experience of working with such a model. Questions here as to the headteacher being the lead professional and 'best teacher' may be raised. A minority of the headteachers interviewed had taken a proactive decision to ensure that they were actively involved in the literacy hour. This decision enabled heads to contribute and support staff in their discussions and future planning of the literacy strategy in their school, from a point of first hand experience. Headteachers thereby potentially increased both their knowledge base of the literacy strategy, and their credibility with their staff.

Headteachers responses to the preferred methods of receiving training (questionnaire data) were fairly evenly split between consultancy both on (50%) and off (47%) the school site, with school based activities being the prime focus for training. Mentoring received the next highest response with 20% of heads opting for this method of training. 17% of headteachers preferred an attachment to a workplace inside of the education system. There was little response to the suggestion of an attachment to a workplace outside of education. Headteachers perceptions of how they wanted to learn fits with Kelly's (1995) notion of learning through active participation, and McMahon's (1994) of learning through mentorship.

A summary of the key issues relating to how primary headteachers training needs might best be met from the questionnaire data, include the following: that training venues should be good quality; that trainers need to be credible; that there needs to be support for headteachers putting initiatives into practice; that heads need a network of colleagues; a mentor should be allocated; link inspectors should act in a non judgmental way; that there should be a handbook of practical guidance; training courses should relate to national initiatives; HEADLAMP was seen as a disappointment not meeting individuals needs, with NPQH being competency based and more relevant but with burdensome weekend

training sessions. Some of these issues have been, or are, currently being addressed by the LEA, for example good quality training venues, credible trainers, and link inspectors acting in a non judgmental way.

Is there consensus from all the different sources of data about what CPD primary heads require.

Overall there was consensus from all of the data sources, that training was needed in management and evaluation of pupil progress, evaluation processes, professional development of staff, and strategic planning and monitoring.

An analysis of the Ofsted reports also revealed that the role of the subject leader was underdeveloped. The questionnaire data showed that headteachers were asking for support in management of improvement of both pupil and teacher performance in a variety of aspects from a skill based approach to changing the culture within the school to create a more motivated staff. 50% of the heads interviewed did not identify a training need, and lack of time for training was noted, with constant changes being introduced centrally from the government which had altered the nature of headship. The more evidence-based approach had prompted headteachers to ask for courses on target setting and support in the interpretation of statistics. The interview data highlighted the need for headteachers to be adaptable and have a network to survive. The Leadership and management Steering Group recommended strategies to support headteachers which included: mentoring; appraisal; peer support through formal and informal networks; sharing good practice including spotlight sessions, conferences focussing on leadership and management; with a strong message of sharing and partnership across the LEA being given.

The headteachers were mostly unfamiliar with NPQH unless their deputy head was undertaking the course, and details with regard to the LPSH and Leadership College were just coming into schools. Mixed messages as to the value and success of the HEADLAMP programme were received. The

LEA currently support schools in management and evaluation, in developing evaluative skills within monitoring, in target setting, and in implementing effective behaviour management policies.

With such a high percentage of heads, in their own perception of their training needs, stating a possible, moderate or high need of training in all of the standards set for headteachers, a clear message is being signalled that training under the standards is needed as a matter of priority across the city. It would be helpful if the LEA when setting up courses for continuing professional development for headteachers' listed the corresponding standard. This would help both the LEA and the headteachers to identify and keep track of their own professional development. It would be helpful if the appraisal process also identified in terms of the targets set, which of the standards the targets corresponded to. This would allow for a more coherent approach to training, linking various elements together.

Chapter five of the research project is focussed on the conclusions and recommendations.

CHAPTER FIVE.

CONCLUSIONS AND RECOMMENDATIONS.

The final chapter will: report the conclusions to the questions raised in the aims of the study; include an interpretation of the findings; limitations of the study; suggestions for future research, and recommendations for the LEA.

Aims of the study.

This study was an examination of the CPD needs of primary headteachers in a new Unitary Authority. The research investigated through questionnaire, interview, and documentary analysis, current primary headteachers responses and attitudes to headship and CPD. It was anticipated that by conducting research in a particular LEA, and by focussing specifically upon the perceptions of primary headteachers, the findings would inform those involved in meeting the CPD needs of primary headteachers. The role of the headteacher is seen to be central to school improvement, and as OfSTED state, 'the headteacher is the critical figure in the drive to raise standards' (OfSTED, 1998a).

Interpretation of the findings – conclusions and recommendations.

Qualifications and training.

It is probable that the majority of headteachers in the LEA qualified before teaching became an all graduate profession with 71% of headteachers having an initial qualification of a Certificate of Education. Male headteachers with less than five years experience were twice as likely to have a degree compared with their female colleagues in post for a similar length of time. Overall, 44% of the heads had undertaken further studies receiving a diploma in education. 20% of the headteachers had undertaken the B.Ed degree, and 24% had completed an MA/M.Ed. All headteachers with less than five years of service had undertaken a further qualification. Indicating that more recent heads were coming into headship with higher qualifications than heads had previously. All of the additional training had been carried out part time, with 72% of the funding

for the various courses coming from the LEA, and 24% being self funded. Other avenues of funding included GEST or governor funding.

Sources of CPD.

Professional development can be differentiated into training - which is typified by short courses and conferences being non award bearing, education – longer award bearing courses, and support – job related procedures and arrangements. These three areas could encompass Watkins and Dury's (1994) four groups of strategies for the development of professionals which include: developing competencies and self insight; taking personal charge; promoting, marketing, networking and cultivating relationships; and developing a new mind set. Current primary headteachers in the LEA own professional development spans a broad range of activities which contribute to their learning. The LEA was a prime source of support for primary heads 90%. It was interesting to note that receiving 10% or less was the University, Higher Education College, mentor and appraisal. The findings do not confirm Baker, Earley and Weindling's (1994) study that the appraisal process led to some positive experiences, allowing for a reflective process to take place and enabling personal and professional dialogue to occur relating to headship. This may be due to the heads lack of experience of the appraisal process, since the cycle within the LEA is currently suspended whilst the whole process is reviewed.

Since 90% of the LEA primary headteachers' look to the LEA to contribute to their learning, it would be advantageous to the CPD needs of headteachers if the LEA worked in partnership, both with its headteachers and with Higher Educational Institutions, to provide targeted courses to meet the needs of heads across the City. This would be for a variety of reasons, notably the ease of access to the courses, and the combination of theory and practice combining expertise, and maintaining credibility with the headteachers. If courses were accredited then headteachers would be able to develop their skills, widen their knowledge, participate in school

improvement projects or action research and personally gain credits which they could put towards a further qualification. Benefits here would be both personal to the headteacher, and institutional, benefiting their school, and would support the findings of Leithwood, Begley and Cousins (1992) whereby the headteacher is the instructional leader, as identified by the link between expert power and empowerment.

What these training needs are has been identified from a variety of sources including an analysis of the OfSTED reports which provided contextual background, as well as data from the questionnaire returns which went to all headteachers, and the interview data from ten representative headteachers, and the LEA Leadership and Management Steering group. With regard to the National Standards overall heads were more confident in leadership, accountability to governors, pupils and parents, and in determining the strategic direction of the school. Greatest needs were established in monitoring and evaluating progress, management of improvement of pupil achievement, and management and performance of staff. Two patterns were noted those of male headteachers, and headteachers, male or female, who had been in post for more than five years. Male heads were confident in four of the six areas (leadership, strategic direction, monitoring and evaluating processes, and accountability to governors and parents), with female heads confident in only two of the six areas (leadership and accountability to governors and parents). Female heads overall therefore identified a wider range of training needs than their male colleagues. Headteachers who had been in post for more than five years showed a greater range of training needs than their less experienced colleagues.

Headteachers with less than five years experience identified a significantly narrower range of training needs focussing on monitoring quality of teaching and management of people. Needs of heads with more than five years experience related to the implementation of government initiatives – Literacy, numeracy strategies and ICT, the use of statistics,

improving staff and pupil performance including staff motivation, with a focus on raising standards. Here more recent heads were more confident having perhaps left the classroom more recently, worked as a deputy with the head as a role model, or having undertaken a further qualification, with their more experienced colleagues perhaps more aware of their own development needs.

Problems and challenges that current headteachers face.

Problems and challenges that headteachers were currently experiencing which would have an impact on their training needs were identified primarily under the headship standards of leadership and management and performance of staff. Headteachers noted on the questionnaire returns that as leaders of their schools they were finding it increasingly difficult to keep up with 'the pace of change'. They were finding it more difficult to be 'proactive' as opposed to 'reactive' and that having 'time to reflect' was indeed a luxury. Headteachers were finding it increasingly difficult to protect 'time in the classroom'. Management and performance of staff was becoming increasingly difficult, whether it was 'older staff in need of refreshment', or to 'sustain moral and enthusiasm of the staff whilst placing increasing demands upon them and myself'. Day to day pressures often left some headteachers feeling more like a 'social worker than a headteacher'. Changes in society and in the headteacher's role and responsibilities are then reflected here.

Headteachers with more than five years experience identified a broader range of issues that posed problems and challenges to them, with female heads naming twice as many areas as their male colleagues. Male heads with less than five years experience of headship presented fewer areas of concern than their female colleagues of the same length of experience. Female heads, of >5 years or <5 years, identified the same areas of concern e.g. none of which male headteachers identified. Female headteachers therefore identified a wider range of needs than their male

counterparts, which would indicate that they have specific requirements for training which need to be addressed.

Headship was viewed by headteachers in the LEA either positively and negatively, or simply negatively. There were no positive only comments. This is indicative of the moral of headteachers and the nature of the job. Positive comments ranged from 'rewarding and exciting' to 'interesting, stimulating and fulfilling', to 'I wouldn't do anything else'. It was notable that a number of headteachers reflected upon the ever changing parameters', and the difficulty of keeping all the 'plates spinning' or of 'juggling eggs'. Difficulties encountered related to governors or parents, and worries were expressed about shrinking budgets, and Government and media references to schools failing children. Headteachers' generally felt a lack of support. Negative responses included the following, 'very lonely', 'very stressful', 'hunted' and 'constantly under pressure'. Headteachers also commented that they felt 'too work focused', leaving themselves very little time for family and friends. Headteachers themselves stated that it was absolutely essential that they as heads remained 'positive and encouraged others', that they were 'adaptable', and that they had access to a 'network to survive'.

Headteachers with more than 5 years in headship answered the question as to how they viewed headship more fully with responses more politically aware commenting on changes to the education system, greater accountability, demands from the government and DfEE, and media criticism. Female heads with five plus years of service also mentioned how rewarding it was to see staff develop, children's enjoyment, and they also expressed concern for colleagues under greater pressure than they were currently. Their answers were therefore extended to include staff, pupils and other headteacher colleagues. All other comments that heads made centred on their relationship with their governors.

The fact that not one headteacher in the LEA responded with positive only statements as to how they view headship, and the strong terms used to

describe how they feel, whether it was e.g. 'hunted', or 'stimulated and fulfilling' or 'something to get out of I think', indicates the very real pressures that headteachers are currently facing. That headteachers felt under pressure from the media and Government, is something that can, in a small way, be addressed at LEA level by responding to the many and various consultation documents. Positive relations with the local press is something that can be fostered proactively at LEA and school level. If as heads state, they feel unsupported and need access to a 'network to survive', the LEA in conjunction with the headteachers needs to actively seek to raise the support mechanisms and networks, thereby ensuring that heads do remain 'positive'.

Limitations of the study.

Whilst acknowledging that the analysis of the findings may yield different emphases in the hands of a different researcher, the writer justifies choices made within the main body of the text and takes full responsibility for the selection of material. It should be noted from the outset that the main thesis of the inquiry is to illuminate what the CPD needs of primary headteachers are in one LEA in the context of raising standards, whilst considering the implications for those involved in CPD.

If the study were to be undertaken again it would be useful to send out a different questionnaire to all primary heads in the LEA, structuring the questions so that they were more focussed in particular areas, for example instead of asking how many years heads had experienced in previous headships, it would be useful to know further details of the nature of the headship. In both the questionnaire and the interview headteachers' alluded to 'power' and one would wish to ask further questions relating to the type of power they were alluding to. One could interview a greater number of headteachers over a longer period of time, and questions could also be asked of senior management and Chairs of governing bodies, adopting a case study approach. One could also investigate further the type of leadership that the heads were currently portraying, and consider

in more depth their values and other factors that impinge on the job e.g. personal or organisational factors.

Suggestions for future research.

Further research into matching the headteacher's experience to the school situation, and investigating whether experience in multiple school settings has an impact on the heads' career development, would add to our understanding. School effectiveness may vary over time and along several dimensions, and more longitudinal studies into how and why schools become more or less effective over time would be useful. To identify what the process factors are in effective management, as well as establishing common criteria of 'effectiveness' and data analysis methods would also be useful to study further. Whether leadership style is influenced by the followers' level of development is another area for future study.

Whether the NPQH or LPSH can be linked to school improvement, is too early to state, but would prove an interesting question to pursue. One may also ask the question, 'does CPD contain an element where the connection between leadership behaviours, conflict, teacher empowerment, and school outcomes can be evaluated?'.

Recommendations for the LEA.

From the data the LEA is well placed to contribute to the CPD needs of its headteachers given the fact that 90% of headteachers in the Authority stated that they looked to the LEA to contribute to their learning, and that 72% of the funding for CPD came from the LEA through government grants. Working in partnership with its headteachers to raise standards is a key element in the LEA Education Plan. The LEA, if it is to impact upon the CPD needs of its headteachers, needs to have a robust evaluation system with a systematic analysis of data. This may include on going dialogue through headteacher steering groups or school self supported evaluation with headteacher and governor involvement, coupled with analysis of public data including SAT results and OfSTED reports.

74% of headteachers in the new Unitary Authority are in their first headship, and 71% of them initially qualified with a Certificate of Education. In response to the questionnaire 73%-85% of headteachers identified having a possible to moderate need of training in all six of the National Standards for Headteachers (TTA, 1998). The research findings also concluded that headteachers were reluctant to be out of school to attend courses, which lasted more than half a day. Headteachers need an appraisal cycle to enable them to enter into personal and professional dialogue, which may also help to raise the heads' morale. It was also established that heads would welcome a mentor. That there is a need for heads CPD, and a willingness to work with the LEA, has been highlighted and the following recommendations for the LEA are proposed, having arisen out of the analysis of the data. Page numbers in brackets indicate the source material from which the recommendations listed below have arisen.

The LEA to further support the CPD of its headteachers may wish to consider the:

a) Organisation of CPD for headteachers.

- ◆ Appointment of a designated CPD officer (P.33, P.118);
- ◆ Establishment of a robust evaluation system, with the systematic analysis of data, which is then used to inform CPD (P.114, P.116);
- ◆ Establishment of a CPD steering group, ensuring an open consultative dialogue (P.114, P.116);
- ◆ Introduction of a planned system of CPD, taking account of individual, institution and LEA needs, and also considering a range of professional development including training, education and support (P.86, P.87, P.109, P.110, P.115, P.118);
- ◆ Introduction of an appraisal cycle (P.36);
- ◆ Introduction of establishing mentors for all new headteachers (P.34, P.107, P.112);

- ◆ Closer co-operation/liaison between the LEA inspection service, governor services and headteachers to ensure consistent messages and that schools identified from analysing the available data are targeted appropriately (P.77);
- ◆ Disseminating good practice identified within the LEA through a variety of ways including fostering further positive relations with the press (P.109, P.112, P.115);
- ◆ National Standards for Headteachers to be referenced in all courses for heads (P.99, P.100, P.120);
- ◆ Review CPD arrangements with neighbouring LEAs and HEIs (P.84, P.85, P.110);

b) Programme of CPD for primary headteachers

- ◆ Introduction of accredited courses, working with higher education institutions (P.34, P.35, P.86);
- ◆ Introduction of a range of opportunities, through a variety of mechanisms, for headteachers to further develop professionally and personally, through for example: accredited courses; member of a steering group/working party; mentoring; workshops; spotlights on good practice; working with inspectors/advisers; shadowing another headteacher; good practice database; cluster meetings/support networks etc (P.32, P.86, P.87, P.93, P.107);
- ◆ Targeting of courses to particular groups of headteachers, who have been identified through data analysis, as well as through self selection (P.79, P. 98, P.100, P.104, P.111, P.115);
- ◆ Introduction of specific courses to cover identified needs: management of pupil achievement; management and performance of staff; monitoring and evaluation of progress; SDP; professional development of staff; governors involvement in planing and monitoring; the role of the subject leaders; interpretation of statistics; leadership; working more effectively with the administration officer; and monitoring the quality of teaching (P.79, P.85, P.95, P.99, P.100, P.101, P.103, P.104, P.115).

c) National developments

- ◆ Ensure that there are procedures/mechanisms for supporting heads undertaking National qualifications, and that national developments are highlighted to support the CPD of the primary headteachers (P.120).

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APPENDIX ONE.

Questionnaire to all primary headteachers in the new Unitary Authority.

CONTINUING PROFESSIONAL DEVELOPMENT FOR PRIMARY HEADTEACHERS: AN INVESTIGATION OF NEEDS AND PROVISION IN

Q1. YOUR AGE: ☐ UNDER 30 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60+

Q2. YEARS IN HEADSHIP-THIS POST: ☐ 0-4 ☐ 5-9 ☐ 10-14 ☐ 15-19 ☐ 20+

Q3. YEARS IN PREVIOUS HEADSHIPS IN TOTAL: ☐ 0 ☐ 1-4 ☐ 5-9 ☐ 10-14 ☐ 15+

Q4. LOCATION OF CURRENT SCHOOL: ☐ URBAN INNER CITY 1 ☐ 2 ☐ 3 ☐ 4 ☐ RURAL 5

Q5. SCHOOL GROUP: ☐ GROUP 1 ☐ GROUP 2 ☐ GROUP 3 ☐ GROUP 4

Q6. TYPE OF SCHOOL: ☐ INFANT ☐ JUNIOR ☐ PRIMARY

Q7. NUMBER OF CLASSES: ☐ 0-3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 20+

Q8. % ON SEN REGISTER:
☐ 0-9% ☐ 10-19% ☐ 20-29% ☐ 30-39% ☐ 40-49% ☐ 50-59%
☐ 60-69% ☐ 70-79% ☐ 80-89% ☐ 90-99%

Q9. % OF FREE SCHOOL MEALS:
☐ 0-9% ☐ 10-19% ☐ 20-29% ☐ 30-39% ☐ 40-49%
☐ 50-59% ☐ 60-69% ☐ 70-79% ☐ 80-89% ☐ 90-99%

Q10. SPECIAL FEATURES OF SCHOOL:

Q11. INITIAL TRAINING DATE: / /

Q12. INITIAL QUALIFICATIONS:
☐ CERT ED ☐ BA ☐ BA(HONS) ☐ BSC ☐ BSC(HONS) ☐ BED ☐ DEd(HONS) ☐ PGCE

Q13. NAME OF COLLEGE/UNIVERSITY

Q14. FURTHER QUALIFICATIONS:

☐ MA ☐ MEd ☐ MBA ☐ DIP ☐ BEd ☐ OFSTED ☐ OTHER

Q15. DATE OF FURTHER QUALIFICATION: / /

☐ FULL TIME ☐ PART TIME

Q16. FUNDING: ☐ SELF ☐ LEA ☐ GOVERNORS ☐ GEST ☐ OTHER

Q17. TIMING OF TRAINING: ☐ DAY ☐ WEEKEND ☐ TWILIGHT ☐ OTHER

Q18. NAME OF COLLEGE/UNIVERSITY:

Q19. ARE YOU CURRENTLY UNDERTAKING TRAINING/QUALIFICATION: ☐ Yes ☐ No

IF YES

Q20. FUNDING: ☐ SELF ☐ LEA ☐ GEST ☐ GOVERNORS ☐ OTHER

Q21. TIMING OF TRAINING: ☐ DAY ☐ WEEKEND ☐ TWILIGHT ☐ OTHER

Q22. TYPE OF TRAINING:

☐ MA ☐ MEd ☐ MBA ☐ DIP ☐ BEd ☐ OFSTED ☐ OTHER

Q23. NAME OF COLLEGE/UNIVERSITY:

Q24. WHERE DO YOU GET YOUR OWN PROFESSIONAL DEVELOPMENT FROM:

☐ UNIVERSITY ☐ HE/COLLEGE ☐ NAHT ☐ NUT ☐ LEA
☐ OU ☐ TES ☐ APPRAISAL ☐ MENTOR
☐ OTHER - PLEASE CLARIFY_____

Q25. WHAT ARE YOUR CURRENT PROFESSIONAL DEVELOPMENT NEEDS IN RELATION TO THE TTA STANDARDS:

	NO	POSSIBLE	MODERATE	GREAT
Q25a. LEADERSHIP	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Q25b. STRATEGIC DIRECTION OF THE SCHOOL	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Q25c. MANAGEMENT AND PERFORMANCE OF THE STAFF	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Q25d. MANAGEMENT OF IMPROVEMENT IN PUPIL ACHIEVEMENT	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Q25e. MONITORING AND EVALUATION OF PROGRESS	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Q25f. ACCOUNTABILITY TO GOVERNORS, PUPILS & PARENTS	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

Q26. WHAT WOULD BE YOUR REFERED METHOD OF RECEIVING TRAINING:

- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|---------------------|--------------------------|
| SCHOOL BASED | <input type="checkbox"/> | OFF SITE PROVISION | <input type="checkbox"/> | CONSULTANCY ON SITE | <input type="checkbox"/> |
| ACTIVITIES | | | | | |
| MENTORING | <input type="checkbox"/> | ATTACHMENT TO WORK | <input type="checkbox"/> | ATTACHMENT TO WORK | <input type="checkbox"/> |
| | | PLACES INSIDE EDUCATION | | PLACES OUTSIDE | |
| CONSULTANCY OFF SITE | <input type="checkbox"/> | | | EDUCATION | |

Q27. WHAT ARE YOUR SPECIFIC TRAINING NEEDS:

Q28. IF YOU HAVE RECEIVED AN OFSTED INSPECTION HAVE ANY TRAINING NEEDS BEEN IDENTIFIED WHICH RELATE TO YOURSELF:

Q29. WHAT ARE THE PROBLEMS/CHALLENGES THAT YOU FACE IN SCHOOL:

Q30. WHAT DOES IT FEEL LIKE TO BE A PRIMARY HEADTEADTEACHER IN THE 1990s:

Q31. ANY OTHER COMMENTS RELATING TO HEADSHIP: training; providers; courses; governors; legislation; realities of headship etc.

Q32. YOUR NAME:

Please print your name in the box if you are willing for the researcher to contact you for clarification if necessary.

**THANK YOU FOR YOUR TIME AND CO-OPERATION IN FILLING
IN THIS QUESTIONNAIRE IT IS MUCH APPRECIATED.**

**PLEASE CAN YOU SEND THE COMPLETED QUESTIONNAIRE
IN THE SAE TO:**

PLEASE RESPOND USING THE SAE BY FRIDAY 27th MARCH.

APPENDIX TWO.

INTERVIEW SCHEDULE.

Selected primary headteachers.

1. BACKGROUND INFORMATION.

- a) Where and when did you train to become a teacher (qualifications)?
- b) How long have you been teaching/a Headteacher?
- c) How many years in your present Headship?
- d) Any previous Headship - how many years?
- e) What made you want to become a Headteacher?
- f) How did you prepare for Headship?
- g) What are the specific opportunities/challenges of being a Head in this school?

2. ROLE OF THE HEADTEACHER.

- a) How do you view Headship?
- b) What does it feel like to be a Headteacher in the late 1990s?
- c) What do you enjoy most about Headship and what interests you the least?
- d) Have you changed since you became a Headteacher?
- e) How is the nature of the Heads task changing?
- f) How do you cope with what is expected of you?
- g) What gives you the most stress and creates most tension and how do you cope with this?
- h) What kind of support do you receive and from whom: LEA; Governors; staff; parents; OfSTED; TTA etc.?
- i) Do you have a regular teaching responsibility in the school, if not what are the factors that prevent you?

3. KEY AREAS OF HEADSHIP.

- a) Do different kinds of schools require a different kind of Head?
- b) Do Heads have to be drawn from within the teaching profession?
- c) There are currently recruitment problems into Headship could groups of schools share a Head?
- d) In what ways do you lead, motivate, support, challenge and develop the work of the staff?
- e) What part do you play in curriculum planning and development?
- f) What part do you play in maintaining effective teaching and learning throughout the school?
- g) How do you manage your relationships and working practices with the governing body?
- h) In what ways do you relate to the pupils, parents and local community?
- i) How do you ensure efficient and effective deployment of staff and resources?
- j) Does a consideration of the key areas of Headship highlight any additional training needs?

4. TRAINING.

- a) Who or what has most helped you in coming to terms with Headship?
- b) Did you take part in HEADLAMP - if so what was your experience of the programme?
- c) What is your view of the NPQH?
- d) The LPSH has identified ICT as an area for development for Heads what is your own view?
- e) Who do you think should train the experienced Heads on the LPSH?
- f) Do you think that you have any current training needs and what are they?
- g) What is the current CPD provision locally - what do you think of it - does it meet the needs of Headteachers?

APPENDIX THREE.

INTERVIEW SCHEDULE.

LEA senior primary inspector.

Responsibility for: DfEE; TTA; finance and efficiency; leadership and management; NPQH; NPQSH.

1. What is the LEA perception of what primary heads training needs are currently? On what information/data is this based?
2. What is the LEA perception of the quality of leadership and management of primary headteachers in its schools? Source of data?
3. What CPD is the LEA currently offering headteachers? Is it meeting the identified needs of primary headteachers?
4. To what extent does the LEA devolve its standards budget?
5. How does the LEA plan to respond in the future to the CPD needs of primary headteachers?
6. What ideally should the LEA's role in CPD for primary heads be?
7. What are the limitations of the LEA capacity to respond to primary heads need for CPD?
8. What views do the LEA hold with regard to the current Government initiatives to raise standards of leadership and management?
9. What is the LEA's view of the NPQH and the LPSH?
10. Are there any other factors that should be taken into consideration when considering the LEA's perspective on the CPD needs of primary headteachers and how these needs might best be met?